

# STATE OF NORTH DAKOTA

## HUMAN RESOURCES MANUAL FOR ACTIVE EMPLOYEES

PEOPLESOFT  
VERSION 8.3

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Written by MAXIMUS, ERP Solutions Division, March 2003.

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# MANAGING POSITIONS

## OVERVIEW

PeopleSoft Human Resources employs an integrated, table-driven design to help your organization keep an effective-dated history of all positions in your organization, regardless of whether they are filled. Therefore, you can track your organizational reporting relationships independently of the employees in the positions.

The State of North Dakota has chosen to use position management functionality. This requires that the position be properly configured prior to being associated with an employee. Position management allows you to set up all the position data in advance. That way, when you hire an employee, all you do is assign them to a position, and the system uses the position information to fill out much of the job data record. This saves time and reduces errors for those involved in the hiring process.

## OBJECTIVES

At the completion of this section, you will be able to:

1. Create a New Position
2. Update Position Data To:
  - Update a position
  - Reclassify a position
  - Transfer between regular and platoon
  - Inactivate a position

# CREATING POSITIONS

## OVERVIEW

The Position Data pages are where positions are defined. You will create and maintain position data on these pages. After you've assigned employees to the positions, this is also where you will update data that affects both positions and incumbents.

The Position Data component contains five pages. The following table lists the pages and describes the required actions you need to take on each page to create a new position.

Page	Actions Taken
<b>Description</b>	Enter <b>Effective Date</b> , <b>Status</b> ( <i>Active</i> or <i>Inactive</i> ), <b>Position Status</b> ( <i>Approved</i> , <i>Frozen</i> , or <i>Proposed</i> ), and <b>Status Date</b> .
<b>Work Location</b>	Enter <b>Company</b> , <b>Department</b> , and <b>Location Code</b> .
<b>Job Information</b>	Enter <b>Job Code</b> , <b>Reg/Temp</b> , <b>Full/Part Time</b> , and <b>Union Code</b> .
<b>Specific Information</b>	Check the <b>Update Incumbents</b> and <b>Budgeted Position</b> checkboxes.
<b>Budget and Incumbents</b>	No action required. Displays current incumbent and current budget information.

## CREATING A NEW POSITION

To begin the process of creating a new position, use the following navigational path: **Home > Develop Workforce > Manage Positions > Use > Position Data**. The following page will appear.

The screenshot shows a web browser window with the PEOPLE Soft logo in the top left. The breadcrumb navigation path is: [Home](#) > [Develop Workforce](#) > [Manage Positions](#) > [Use](#) > **Position Data**. The main heading is **Position Data**. Below it is a section titled **Find an Existing Value**. This section contains several search criteria with input fields: Position Number, Description, Position Status (a dropdown menu), Business Unit, Department, Job Code, and Reports To Position Number. Each of the Business Unit, Department, and Job Code fields has a magnifying glass icon to its right. Below these fields are three checkboxes: ☐ Spacer image, ☐ Include History, and ☐ Correct History. At the bottom of the search section are three buttons: **Search**, **Clear**, and [Basic Search](#). At the very bottom of the page is a hyperlink: [Add a New Value](#).

---

**Note:** This will be the initial page you will see for all position management transactions.

---

To create a new position, click on the [Add a New Value](#) hyperlink. The following page will appear.

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites

**PEOPLE**  
Soft

[Home](#) > [Develop Workforce](#) > [Manage Positions](#) > [Use](#) > **Position Data**

### Position Data

### Add a New Value

Position Number:

[Find an Existing Value](#)

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites Media Print View Print Print Preview Close

**PEOPLE**  
Soft

[Home](#) [Worklist](#) [Help](#)

[Home](#) > [Develop Workforce](#) > [Manage Positions](#) > [Use](#) > **Position Data** [New Window](#)

Description Work Location Job Information Specific Information Budget and Incumbents

Position Number: 00000000

Headcount Status: Current Head Count: 0 out of 0

View All First 1 of 1 Last

\*Effective Date:  \*Status: Active

Reason:  New Position Action Date: 02/12/2003

\*Position Status: Approved Status Date:  ☐ Key Position

Reports To:

Dotted-Line Report:

Title:  Short Title:


Long Description:

[Detailed Job Description](#)


[Description](#) | [Work Location](#) | [Job Information](#) | [Specific Information](#) | [Budget and Incumbents](#)

## DESCRIPTION PAGE

**Effective Date** – Identifies the date the position becomes effective. The system defaults in the system date (current date). Enter the date the new position will become effective.

**Status** – Indicates whether the status of the position is *Active* or *Inactive*. Select one of these values from the drop down selections by clicking .

**Reason** – Rationale for creating the new position. Since a new position is being created, the system defaults to *NEW*.

**Position Status** – Indicates whether the position is *Approved*, *Frozen*, or *Proposed*. Select one of these values from the drop down selections by clicking .

**Reports To:** Not currently used.

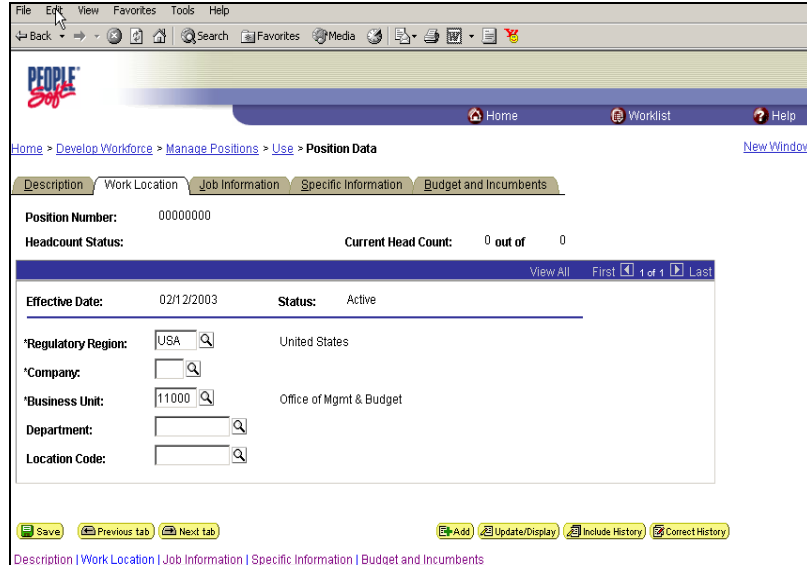
**Dotted-Line Report:** Not currently used.

**Title:** Defaults from the Job Code table.

**Short Title:** Defaults from the Job Code table.

**Status Date** – Displays the date that a position first held a particular status value. Since this a new position, the **Status Date** will be the same as the **Effective Date**. The system defaults the **Effective Date** in this field.

Click on the **Work Location** tab to display the following page.



The screenshot shows a web browser window with the PEOPLE Soft application. The breadcrumb trail is: Home > Develop Workforce > Manage Positions > Use > Position Data. The 'Work Location' tab is selected. The form displays the following information:

- Position Number: 00000000
- Headcount Status: Current Head Count: 0 out of 0
- Effective Date: 02/12/2003
- Status: Active
- \*Regulatory Region: USA (lookup icon) United States
- \*Company: (lookup icon)
- \*Business Unit: 11000 (lookup icon) Office of Mgmt & Budget
- Department: (lookup icon)
- Location Code: (lookup icon)


At the bottom, there are buttons for Save, Previous tab, Next tab, Add, Update/Display, Include History, and Correct History. A status bar at the very bottom shows: Description | Work Location | Job Information | Specific Information | Budget and Incumbents.

## WORK LOCATION PAGE

**Regulatory Region** – Defaults to *USA*.

**Company** – Enter *ND* for State of North Dakota.

**Business Unit** – Will default to your Agency's BU.

**Department** – Enter the appropriate department code or select from the Lookup page by clicking . The following Lookup page will appear.

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Media

**PEOPLE**  
*Soft*

[Home](#) > [Develop Workforce](#) > [Manage Positions](#) > [Use](#) > **Position Data**

### Lookup Department

SetID: 11000

Department:

Description:

Company:

Location SetID:

Location Code:

Budget with Department:

**Lookup** **Clear** **Cancel** [Basic Lookup](#)

Enter either **Department** or **Description** information and click **Lookup**. Click on the appropriate value from the selection list to populate the field.

**Location Code (on the Work Location page)** – The location value may default after you have entered the **Department** field information. The location code identifies the physical location where the person who will occupy this position will work. Verify that the location code is correct or change if necessary.

Click on the **Job Information** tab to display the following page.

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites Media

PEOPLE Soft

Home Worklist Help

Home > Develop Workforce > Manage Positions > Use > Position Data

Description Work Location Job Information Specific Information Budget and Incumbents

Position Number: 00000000

Headcount Status: Current Head Count: 0 out of 0

Effective Date: 02/12/2003 Status: Active

Job Code: Manager Level:

\*Reg/Temp: Regular

\*Full/Part Time: Full-Time

\*Regular Shift: Not Applicable

Union Code:

Defaults

Salary Plan: Grade: Step:

Standard Hours: Work Period:

Save Previous tab Next tab Add Update/Display Include History Correct History

Description | Work Location | Job Information | Specific Information | Budget and Incumbents

## JOB INFORMATION PAGE

**Job Code** – Enter the job code that this position is associated with, or select from the lookup page by clicking . The following Lookup page will appear.

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites Media

PEOPLE Soft

Home > Develop Workforce > Manage Positions > Use > Position Data

Lookup Job Code

SetID: STATE

Job Code:

Lookup Clear Cancel Basic Lookup

Enter search information and click **Lookup**. Click on the appropriate value to populate the field.

Once the **Job Code** information is entered, the following fields default from the Job Code table:

- **Reg / Temp** – Indicates whether this is a regular position or a temporary position.
- **Full / Part** – Indicates whether the position is full or part time.
- **Regular Shift** – Do not change the default value. In the future, shift information will be handled in Time and Labor when an employee is assigned a position.
- **Salary Plan, Grade, Standard Hours, Work Period** – Indicates the salary components and hours for this position.
- **Union Code** – Not currently used.

Verify that the values are correct and change if necessary.


**Note:** When the **Job Code** information is entered, the appropriate values for the **Title** and **Short Title** fields on the **Description** page default.

Click on the **Specific Information** tab to display the following page.

The screenshot shows the PEOPLE Soft web application interface. The top navigation bar includes links for Home, Worklist, and Help. The breadcrumb trail indicates the path: Home > Develop Workforce > Manage Positions > Use > Position Data. The 'Specific Information' tab is selected, showing details for a position with the number 00000000. The 'Headcount Status' is 0 out of 0. The 'Effective Date' is 02/12/2003 and the 'Status' is Active. The 'Max Head Count' is set to 1. The 'Mail Drop ID' and 'Work Phone' fields are empty. The 'Health Certificate' and 'Signature Authority' fields have dropdown menus. A red arrow points to the 'Budgeted Position' checkbox, which is checked. Other checkboxes include 'Update Incumbents', 'Confidential Position', and 'Job Sharing Permitted'. The bottom of the page has a navigation bar with buttons for Save, Previous tab, Next tab, Add, Update/Display, Include History, and Correct History. The footer shows the navigation tabs: Description | Work Location | Job Information | Specific Information | Budget and Incumbents.

## SPECIFIC INFORMATION PAGE


Ensure that the **Budgeted Position** checkbox is checked and the **Update Incumbents** checkbox is unchecked (as depicted by the arrow above). The **Update Incumbents** checkbox should be unchecked since this is a new position and contains no incumbents.

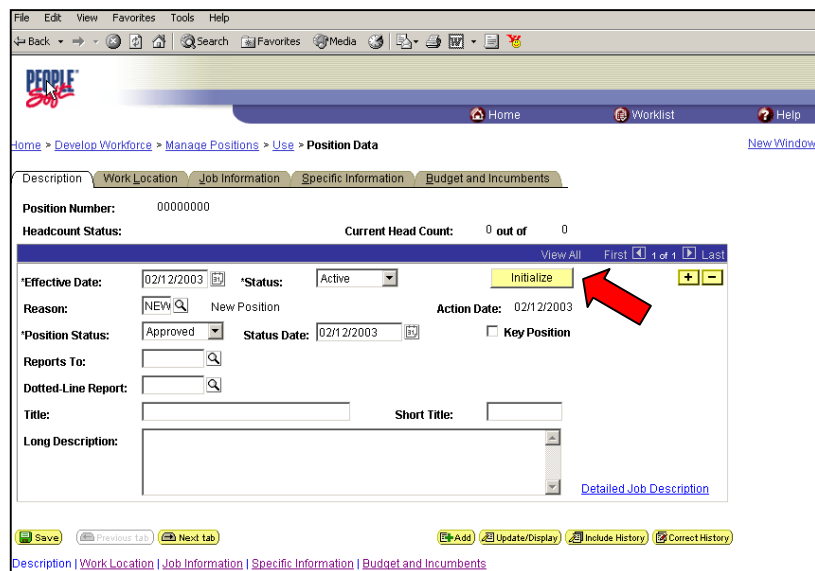
Click  to save the new position in the system.

The Position Number field will be populated with the number that is assigned by the system.

## COPYING FROM AN EXISTING POSITION

If you are creating a position that is similar to a position that already exists, you can copy existing position information into the new position.


To do this, add a position (as described previously) until you arrive at the **Position Data - Description** tab (shown below). On the **Description** page, you will see an  button (indicated by the arrow).



The screenshot shows the PEOPLE Soft web application interface. The breadcrumb trail is: Home > Develop Workforce > Manage Positions > Use > Position Data. The 'Description' tab is selected. The form contains the following fields and controls:

- Position Number:** 00000000
- Headcount Status:** (empty)
- Current Head Count:** 0 out of 0
- Effective Date:** 02/12/2003
- Status:** Active
- Reason:** NEW (dropdown), New Position
- Action Date:** 02/12/2003
- Position Status:** Approved (dropdown)
- Status Date:** 02/12/2003
- Key Position:** ☐
- Reports To:** (lookup field)
- Dotted-Line Report:** (lookup field)
- Title:** (text field)
- Short Title:** (text field)
- Long Description:** (text area)
- Buttons:** Save, Previous tab, Next tab, Add, Update/Display, Include History, Correct History.

A red arrow points to the **Initialize** button located next to the 'Status' dropdown.

Click on the  button and the following page will appear:

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites History

**PEOPLE<sup>®</sup> Soft**

[Home](#) > [Develop Workforce](#) > [Manage Positions](#) > [Use](#) > **Position Data**

**Default Position Data**

**Enter a Position Number to default from**

Position Number:

Enter the position number you want to copy from into the **Position Number** field and click . The system automatically populates the position data components with the information from the position you have selected. Continue to add the position as described previously.

## UPDATING POSITION DATA

To begin using the Position Data pages, use the following navigation path: **Home > Develop Workforce > Manage Positions > Use > Position Data**. The search page to find an existing position value will appear as described previously. Once you have selected the position number you wish to work with, the following page will appear.

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites Media Print Mail Web

PEOPLE Soft

Home Worklist Help

Home > Develop Workforce > Manage Positions > Use > Position Data [New Window](#)

Description Work Location Job Information Specific Information Budget and Incumbents

Position Number: 00000002 Deputy

Headcount Status: Overallocated Current Head Count: 4 out of 1

Effective Date: 01/01/1901 Status: Active View All First 1 of 1 Last

Reason: NEW New Position Action Date: 09/24/2002

Position Status: Approved Status Date: 01/01/1901 Key Position

Reports To:

Dotted-Line Report:

Title: Deputy Short Title: Deputy

Long Description:

[Detailed Job Description](#)

Save Return to Search Next in List Previous in List Previous tab Next tab Add Update/Replace Include History Correct History

Description | Work Location | Job Information | Specific Information | Budget and Incumbents

Insert a new data row by clicking the **+** sign across from the **Status** field. After you click **+**, a new data row will appear. Use this row to enter updated information for this position. An example is shown on the next page.

File Edit View Favorites Tools Help

Back Forward Stop Home Worklist Help

Home > Develop Workforce > Manage Positions > Use > Position Data [New Window](#)

Description Work Location Job Information Specific Information Budget and Incumbents

Position Number: 00000002 Deputy

Headcount Status: Overallocated Current Head Count: 4 out of 1

View All First 1 of 2 Last

Effective Date: 02/12/2003 Status: Active

Reason: Action Date: 02/12/2003

Position Status: Approved Status Date: 01/01/1901 Key Position

Reports To:

Dotted-Line Report:

Title: Deputy Short Title: Deputy

Long Description:

[Detailed Job Description](#)

Save Return to Search Next in List Previous in List Previous tab Next tab Add Update/Display Include History Correct History

[Description](#) | [Work Location](#) | [Job Information](#) | [Specific Information](#) | [Budget and Incumbents](#)


Notice, as indicated by the arrow on the right that you are now looking at 1 of 2 data rows. Also, as depicted by the arrow on the left, the **Reason** field is now blank.

The **Effective Date** field defaults to the current date (system date). Enter the date that the new position information is to take effect.

The following scenarios begin with the assumption you have already selected the position, inserted a new data row, and entered the appropriate effective date.

**Note:** The same Position Data pages that were used to add positions will be used in the following scenarios to update position information.

### ***ACTION 1: UPDATE A POSITION***


1. Verify or change the value in the **Status** field.
2. Enter the appropriate information in the **Reason** field or select a reason by clicking  and using the Lookup page.
3. Verify or change the value in the **Position Status** field and **Status Date** field.
4. Click on the **Work Location** tab.
5. Enter the new department information in the **Department** field if appropriate.
6. Enter the new work location information in the **Location Code** field if appropriate.
7. Verify that Business Unit and Department are correct.
8. Click on the **Job Information** tab.
9. Enter the new job code in the **Job Code** field if appropriate. As is the case with adding new positions, the following fields default when the **Job Code** field is populated:
  - **Reg / Temp**
  - **Full / Part**
  - **Salary Plan, Grade, Standard Hours, and Work Period**

Verify the above information is correct and change as necessary.


---

**Note:** When the **Job Code** information is entered, the values for the **Title** and **Short Title** fields on the **Description** page default.

---

10. Click on the **Specific Information** tab.
11. Click on the **Update Incumbents** box if you want the incumbent to be updated with the changes you made. Depending on the reason for the update, incumbents may, or may not, need to be updated. **Update Incumbents** automatically updates any changes made to the position directly to the job record of the person(s) assigned to the position.
12. Verify that the **Budgeted Position** box is checked.
13. Click on  to save the position data changes.

***ACTION 2: RECLASSIFICATION / JOB CODE CHANGE***

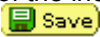
1. Verify or change the value in the **Status** field.
2. Enter the appropriate information in the **Reason** field or select a reason by clicking  and using the Lookup page.
3. Verify or change the value in the **Position Status** field and **Status Date** field.
4. Click on the **Work Location** tab.
5. Enter new department information in the **Department** field as appropriate.
6. Enter new work location information in the **Location Code** field as appropriate.
7. Verify that Business Unit and Department are correct.
8. Click on the **Job Information** tab.
9. Enter the new job code in the **Job Code** field. As is the case with adding new positions, the following fields default when the **Job Code** field is populated:
  - **Reg / Temp**
  - **Full / Part**
  - **Salary Plan, Grade, Standard Hours, and Work Period**

Verify the above information is correct or change as necessary.

---


**Note:** When the **Job Code** information is entered, the values for the **Title** and **Short Title** fields on the **Description** page default.

---

10. Click on the **Specific Information** tab.
11. Click on the **Update Incumbents** box or verify that it is checked.
12. Verify that the **Budgeted Position** box is checked.
13. Click on the **Budget and Incumbents** tab. Note the employee ID number of the incumbent.
14. Click on  to save the position data changes.

15. Navigate to the **Job Data** pages by clicking **Home** in the navigational breadcrumb and then using the following navigational path: **Home > Administer Workforce > Administer Workforce (GBL) > Use > Job Data**.
16. Enter the employee number of the incumbent in the **Employee ID** field.
17. Click on the **Job Information** tab.
18. Enter the appropriate employee classification in the **Empl Class** field.
19. Click on the **Payroll Tab**. Verify that the **pay group** and **holiday schedule** are still correct.

### ***ACTION 3: TRANSFER POSITION***



1. Verify or change the value in the **Status** field.
2. Enter the appropriate information in the **Reason** field or select a reason by clicking  and using the Lookup page.
3. Verify or change the value in the **Position Status** field and **Status Date** field.
4. Click on the **Work Location** tab.
5. Enter new department information in the **Department** field if necessary.
6. Enter the new work location information in the **Location Code** field if necessary.
7. Verify that Business Unit and Department are correct.
8. Click on the **Job Information** tab.
9. Enter the new job code in the **Job Code** field. As is the case with adding new positions, the following information defaults on the page when the **Job Code** field is populated:
  - **Reg / Temp**
  - **Full / Part**
  - **Salary Plan, Grade, Standard Hours, and Work Period**

Verify the above information is correct or change as necessary.

---

**Note:** When the **Job Code** information is entered, the values for the **Title** and **Short Title** fields on the **Description** page default.

---

10. Click on the **Specific Information** tab.
11. Click on (or ensure) that the **Update Incumbents** box is checked.
12. Click on .
13. Navigate to the **Job Data** pages by clicking **Home** in the navigational breadcrumb and then using the following navigational path: **Home > Administer Workforce > Administer Workforce (GBL) > Use > Job Data**.
14. Click on the **Job Information** tab.
15. Enter the appropriate employee classification in the **Empl Class** field.
16. Click on the **Payroll** tab and verify that the **Pay Group** and **Holiday Schedule** information is correct.
17. Click on Employment Data hyperlink.
18. Click on the **Employment Dates** tab.
19. Enter (or remove as appropriate) any probation / provisional date on the **Employment Dates** tab.
20. Click on  to save your **Job Data** changes and complete the process.

# HIRING AN EMPLOYEE

## OVERVIEW

Essential employee data must be entered into the system before managing any human resource activity for employees. Once entered, you can input additional employee data and track a complete work history for each employee.

Many of the pages you will use when you hire an employee are the same ones you will use later to update information on existing employees.

The following is a summary of the components that are used during the hiring process. Most required fields *are preceded by an asterisk* in the system and must be filled in before saving the component.

To hire an employee you will progress through the **Personal Data, Job Data, Employment Data, Earnings Distribution, and Benefits Program Participation** pages. ***DO NOT save your data until you have completed the full hire process – through the benefits program participation.***

You will then enter emergency contact, driver's license, and worker's compensation information. ***You will save your data after each component.***

The following tables describe the components of the hire process.

Page Name	Page Description
-----------	------------------

**Personal Data**

Name	Employee name.
Address	Home address, mailing address, phone numbers, and Email.
Personal History	Gender, Education Level, Marital Status, Military Status, and Employment Eligibility Proof.
Eligibility/Identity	Date of birth, original hire date, referral source, social security number, and ethnic group.

**Job Data**

Work Location	Employee status, action / reason codes, job indicator, position number, company, business unit, department, and location.
Job Information	Job code, regular/temporary, full/part time, standard hours, FTE, work period, FLSA status, and work day hours.
Payroll	Pay group, holiday schedule, employee type, tax location, and FICA status.
Salary Plan	Salary plan and grade.
Compensation	Compensation rate frequency, rate code, and comp rate.

#### Employment Data

Employment Information	Business title and work phone
Employment Dates	Hire date, probation date, termination date, last day worked, rehire date, expected return date, company seniority date, service date, date of last increase, last verification date, and professional experience date.

#### Earnings Distribution

Job Earnings Distribution	Identifies job earnings distribution, earnings type, earnings code, and distribution percent.
---------------------------	---

#### Benefits Program Participation

Benefit Program Participation	Identifies the benefit programs and the effective date.
-------------------------------	---

#### Workers Compensation

Worker's Compensation	Identifies worker's compensation code and percent.
-----------------------	--

#### Emergency Contact

Emergency Contact	Designates an emergency contact for the employee that includes the contact name, relationship, address, and phone numbers.
-------------------	--

#### Driver's License

Driver's License	Applicable for positions that operate motor vehicles. Includes the following information: driver's license number, state, valid from / to dates, and the license type.
------------------	--

## OBJECTIVES

At the completion of this section you will be able to hire an employee into the system by entering the following information:

- Personal data such as name, address, phone numbers, educational information, and social security number.
- Job data that includes the position, work location, and compensation.
- Earnings distribution information.
- Benefit program participation information.
- Worker's compensation information.
- Emergency contact information.
- Driver's license information.

## PREPARATION FOR HIRING AN EMPLOYEE

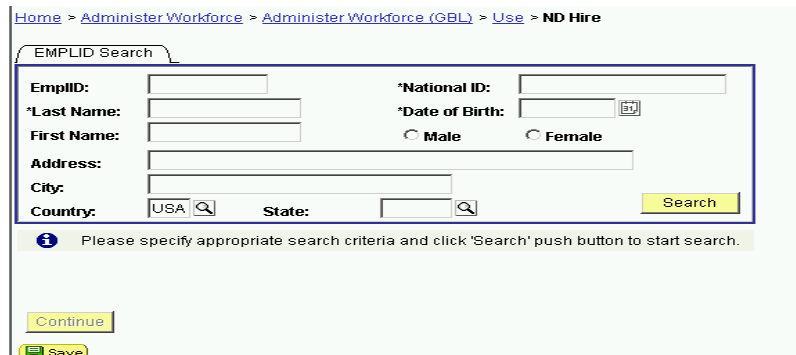
### VERIFICATION OF POSITION INFORMATION

Since North Dakota is using position management functionality within PeopleSoft, it is imperative that all position data is correct. The hiring of a new employee is a good time to verify that the job information (department, job title, etc.) associated with a particular position is correct. To do this, see the Managing Positions Section of the manual.

### NDHIRE


To begin the hiring process, navigate to the ND Hire page by using the following navigational path: **Home > Administer Workforce > Administer Workforce (GBL) > Use > NDHire**

The system will display the following:



The screenshot shows the 'ND Hire' page with a breadcrumb trail: Home > Administer Workforce > Administer Workforce (GBL) > Use > ND Hire. Below the breadcrumb is a tab labeled 'EMPLID Search'. The form contains the following fields and controls:

- EmplID:** Text input field.
- \*Last Name:** Text input field.
- First Name:** Text input field.
- Address:** Text input field.
- City:** Text input field.
- Country:** Dropdown menu with 'USA' selected.
- State:** Dropdown menu.
- \*National ID:** Text input field.
- \*Date of Birth:** Text input field with a calendar icon.
- Gender:** Radio buttons for 'Male' and 'Female'.
- Search:** Yellow push button.
- Continue:** Yellow push button.
- Save:** Green push button with a floppy disk icon.

Below the form is a message:  Please specify appropriate search criteria and click 'Search' push button to start search.

Enter information for the new employee in the “ND Hire” screen. Last Name, National ID, and Date of Birth are required fields. (The ND Hire process matches one of the following or both: National ID **or** the Last Name and Date of Birth.) Press search.

You will get one of the following three results:

1) If no records are found (see below), click on Continue for the hire process.

Home > Administer Workforce > Administer Workforce (GBL) > Use > ND Hire

EMPLID Search

EmplID:  \*National ID: 123456789  
 \*Last Name: LEGHORN \*Date of Birth: 07/01/1960   
 First Name: FOGHORN ☐ Male ☐ Female  
 Address:   
 City:   
 Country: USA  State:

No Employee records were found that matched your search criteria.

You can either change your search criteria (and try again) or click the 'Continue' push button and use NEW (i.e. the system will assign the next available Employee Id for you).

The following screen shall appear:

Home > Administer Workforce > Administer Workforce (GBL) > Use > Hire

Hire

Add a New Value

EmplID:   
 Empl Rcd Nbr: 0

Click on Add to proceed through the hire process. The EmplID should be left blank. The employee id will appear as *NEW* as you begin the hiring process. Peoplesoft will assign an EmplID after you complete the hire process and click on save.

2) If a matching record is found in the Student Admin (SA) System, you may then select the correct matching record and click 'Continue' to proceed through the hire process.

Home > Administer Workforce > Administer Workforce (GBL) > Use > ND Hire [New Window](#)

EMPLID Search

EmplID:  \*National ID: 123456789  
 \*Last Name: SC \*Date of Birth: 03/   
 First Name:  ☐ Male ☐ Female  
 Address:   
 City:   
 Country: USA  State:

1 Employee records were found that matched your search criteria.

Please review the Employee details in the results returned. If you find an Employee Id that you wish to use, please check the 'Select' checkbox against that Employee row and click the 'Continue' push button. If you do not find an Employee Id that meets your requirements, you can either change your search criteria (and try again) or click the 'Continue' push button and use NEW (i.e. the system will assign the next available Employee Id for you).

Employee Id Search Results [View All](#) [First](#) [1 of 1](#) [Last](#)

EmplID	Name	Date of Birth	City	State	Address	Country	Gender	System	Select
1 02 6	Sch	03/	Fargo	ND	27 Ave Sw #	USA	M	SA	<input type="checkbox"/>

SA=Student Admin System  
Click in the 'Select' box  
Then Click 'Continue' to hire

The following screen shall appear:

[Home](#) > [Administer Workforce](#) > [Administer Workforce \(GBL\)](#) > [Use](#) > [Hire](#)

**Hire**

**Add a New Value**

EmplID:

The employee id is brought in from the student administration system. You may click on add and proceed through the hire process.

3) Finally, if a matching record is found in the HR database (or both HR & SA as below), it will be necessary to switch to a Transfer or Re-Hire process.

[Home](#) > [Administer Workforce](#) > [Administer Workforce \(GBL\)](#) > [Use](#) > [ND Hire](#) [New Window](#)

EMPLID Search

EmplID:  National ID:

Last Name:  Date of Birth:

First Name:  ☐ Male ☐ Female

Address:

City:

Country:  State:

2 Employee records were found that matched your search criteria.

Please review the Employee details in the results returned. If you find an Employee Id that you wish to use, please check the 'Select' checkbox against that Employee row and click the 'Continue' push button. If you do not find an Employee Id that meets your requirements, you can either change your search criteria (and try again) or click the 'Continue' push button and use NEW (i.e. the system will assign the next available Employee Id for you).

EmplID	Name	Date of Birth	City	State	Address	Country	Gender	System	Select
1 0 4	H	09/	BISMARCK	ND	41 ST	USA	F	HR	<input type="checkbox"/>
2 0 4	H	09/	Bismarck	ND	250 Rd	USA	F	SA	<input type="checkbox"/>

For rehires and transfers, refer to the Maintaining Employee Information section of this manual and/or the transfer and rehire checklists.

## PERSONAL DATA


The Personal Data pages are used to record and access personal information about employees. The Personal Data pages include the following: **Name**, **Address**, **Personal History**, and **Eligibility / Identify**. Many components and processes elsewhere within PeopleSoft reference the data stored on the Personal Data pages.

The **Name** page will appear as shown below.

The screenshot shows the PeopleSoft 'Name' page. At the top, there's a navigation bar with 'Home', 'Worklist', and 'Help'. Below it, a breadcrumb trail reads 'Home > Administer Workforce > Administer Workforce (GBL) > Use > Hire'. The page has tabs for 'Name History', 'Address History', 'Personal History', and 'Identity Diversity'. The 'Name' tab is active. The form includes fields for 'EmpID' (NEW), 'Employee' type, 'Name Type' (Primary), 'Effective Date' (02/12/2003), 'Format Using' (USA, United States), and a 'Person Name' section with fields for Prefix, First, Middle, Last, and Suffix. A 'Name' field is also present. At the bottom, there are buttons for 'Save', 'Previous tab', 'Next tab', 'Refresh', and 'Add'.


## NAME PAGE

**Note:** Use mixed case for all data entries. The PeopleSoft system is case sensitive.


**ID** – This is the employee identification number assigned by PeopleSoft. The ID number will appear as *NEW* as you begin the hiring process. This will change after you complete the hiring process and click on .

**Effective Date** – Enter the employee's hire date. This defaults to the current date. If the hire date is a date other than the default date, you can change it appropriately.

**Format Using** – Defaults to *USA*.

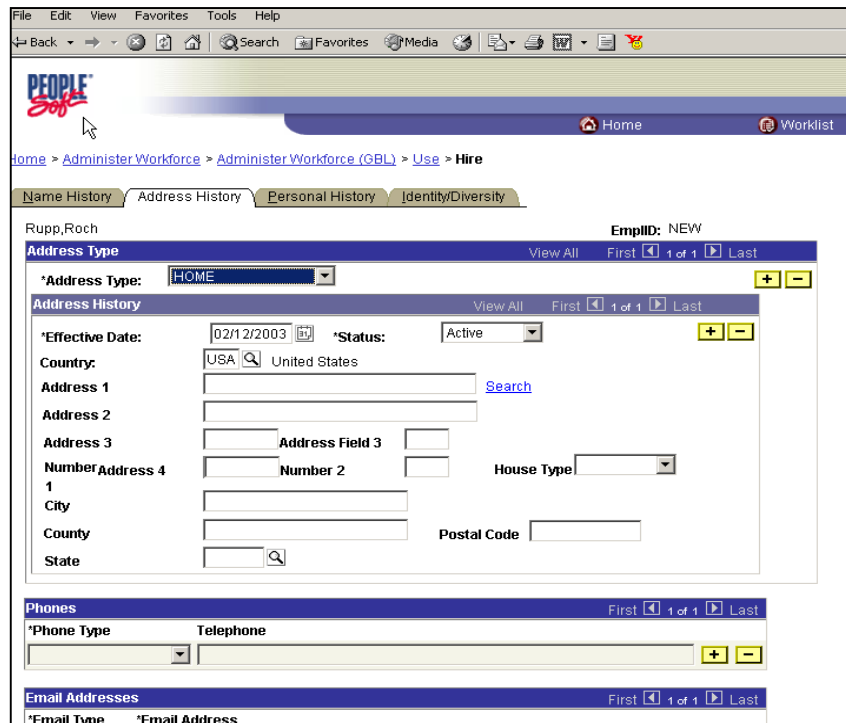
**Prefix** – Click on the  to choose a pre-defined prefix title. Options include *Miss.*, *Mr.*, *Mrs.*, *Ms.*, etc.

**First Name, Middle and Last Name** – Enter the employee's name in the fields.

**Suffix** – Click on the  to choose a pre-defined suffix from the Lookup page. Options include *Jr.*, *Sr.*, etc.

**Note:** PeopleSoft enters the employee's name in the **Name** field after **First Name, Middle Initial and Last Name** have been entered. PeopleSoft only requires that a first and last name be entered. Prefix, middle name or initial, and suffix is optional.

Click the **Address History** tab and the following page will appear.



The screenshot shows the PeopleSoft web interface for the 'Address History' page. The browser window has a menu bar (File, Edit, View, Favorites, Tools, Help) and a toolbar. The page title is 'PEOPLE Soft'. The breadcrumb trail is 'Home > Administer Workforce > Administer Workforce (GBL) > Use > Hire'. The 'Address History' tab is selected, showing a list of address types with 'HOME' selected. The 'Address History' section includes fields for 'Effective Date' (02/12/2003), 'Status' (Active), 'Country' (USA), and various address fields (Address 1, Address 2, Address 3, Address 4, City, County, State, Postal Code). There are also sections for 'Phones' and 'Email Addresses'.

## ADDRESS PAGE

**Effective Date:** This defaults to the current date. Enter the employee's hire date. If the hire date is a date other than the default date, you can change it appropriately.

**Address** – Record the employee's home address. The system uses the home address stored here when printing all correspondence (e.g. Paychecks, Mailing Labels, etc.). Each employee must have a home address. The mailing address may be entered here by inserting a row. However, if the employee wants their check mailed to a different address than their home address, entering a mailing address here does not override the home address. You must indicate the check address in Payroll Data.


**Country** – Defaults to *USA*.

**Address 1** – Enter the employee's street address.


The **Address 2** and **Address 3** fields are optional. These fields may be used to store additional address data (e.g. Apartment Number, or "Care Of..." notations).

**City, County, Postal** and **State** – Enter information as appropriate. The **Postal** field is used for the employee's zip code.

To enter phone numbers, go down to the phone section.


**Phone Type** – Select the appropriate phone type by clicking the  at the right of the field.

**Telephone** – Enter the phone number. The system automatically formats the number; the phone format is populated by default with 000/000-0000.


To enter additional phone numbers, click on the  (as indicated by the arrow in the above screen shot).

If you wish to enter an email address, go down to the email address section.

Email Addresses		First	1 of 1	Last
Email Type	Email Address			
<input type="text"/>	<input type="text"/>			
		<input type="button" value="+"/> <input type="button" value="-"/>		

**Email Type** – Select the appropriate value from the available options by clicking the  at the right of the field.

**Email Address** – Enter the appropriate email address.

To enter additional email addresses, click on the .

Click the **Personal History** tab and the following page will be displayed.

Home > Administer Workforce > Administer Workforce (GBL) > Use > Hire

Name History Address History **Personal History** Identity/Diversity

Smith, Fred EmpID: NEW

**Personal Data** View All First 1 of 1 Last

\*Effective Date: 03/18/2003  
 \*Gender: Unknown  
 Alternate Employee ID:  
 \*Highest Education Level: A-Not Indicated  
 Language Code:  
 \*Marital Status: Single  
☐ Full-Time Student ☐ Smoker  
 As of: As of:

USA

Military Status: Not indicated  
 Date Entitled to Medicare:  
☒ Eligible to Work in U.S.

Employment Eligibility Proof  
 1: 2:

Personal Data Job Data Employment Data Earnings Distribution Benefits Program Participation

## PERSONAL HISTORY PAGE

**Effective Date:** This defaults to the current date. Enter the employees hire date. If the hire date is a date other than the default date, you can change it appropriately.

**Gender** – The field defaults to *Unknown*. Click the  to select either *Male* or *Female*.

**Alternate Employee ID:** Not currently being used. This field is to record a second type of ID for an employee.

The **Highest Education Level** field is mandatory. Select the appropriate option from the drop down list.

**Language Code:** Not currently being used. It is the employee's native or preferred language.

**Marital Status:** This field is for the employee's actual marital status (not their tax status).

**Full Time Student:** Informational only.

**Smoker:** Informational only.

## USA:

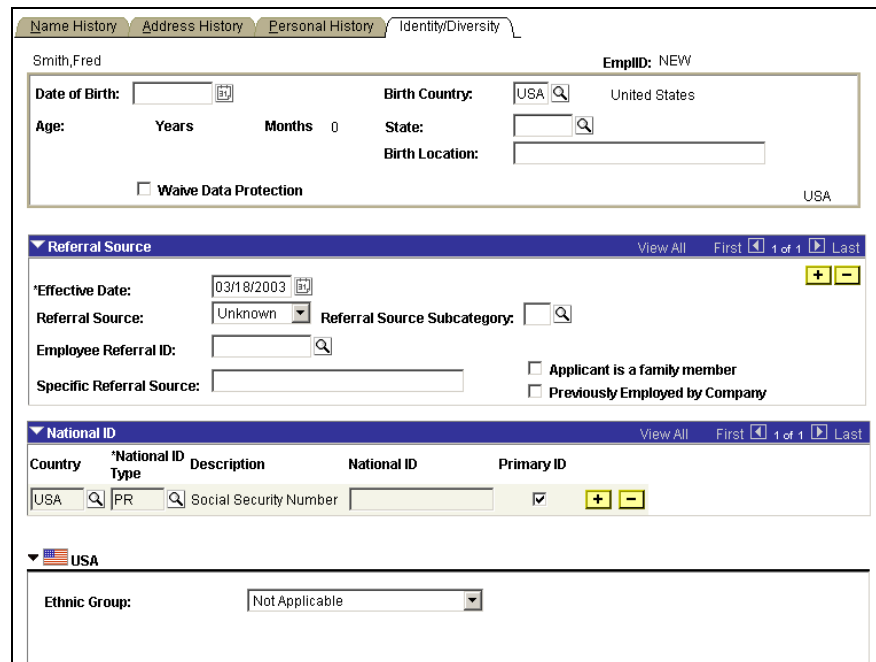
**Military Status (optional):** Select appropriate option from the drop down list.

**Date Entitled to Medicare:** Not currently being used.

**Eligible to Work in US:** Check if the employee is eligible to work in the US.

**Employment Eligibility Proof:** Record forms of identification to prove employee's eligibility to work in the US (I9 form).

Click the **Identity / Diversity** tab and the following page will appear.



Smith, Fred EmplID: NEW

**Date of Birth:**  **Birth Country:**  USA  United States

**Age:**  Years  Months  0 **State:**  **Birth Location:**

☐ Waive Data Protection USA

---

**Referral Source** View All First 1 of 1 Last

**\*Effective Date:**  03/18/2003 **Referral Source:**  Unknown **Referral Source Subcategory:**

**Employee Referral ID:**  **Specific Referral Source:**

☐ Applicant is a family member  
☐ Previously Employed by Company

---

**National ID** View All First 1 of 1 Last

Country	*National ID Type	Description	National ID	Primary ID
USA	PR	Social Security Number	<input type="text"/>	<input checked="" type="checkbox"/>

---

**USA**

**Ethnic Group:**  Not Applicable

## IDENTITY/DIVERSITY PAGE

**Birthdate** – Enter the employee's date of birth. The system references this field for certain calculations in the Base Benefits and Payroll modules. Once you enter a birth date, the system calculates the person's age in years and months.

The **Birth Country**, **State**, and **Birth Location** are for information only and should be filled in, if known.

### REFERRAL SOURCE:

**Effective Date:** This defaults to the current date. Enter the employees hire date. If the hire date is a date other than the default date, you can change it appropriately.

**Referral Source:** There is a scroll list / lookup to choose an option.

**Employee Referral ID:** This is optional. You may select an employee in the lookup who referred the employee.

**Applicant is a Family Member:** There is a box to check if this applies.

**Previously Employed by Company:** If the employee was previously employed by the State of North Dakota or the ND University System, please check this box.

### NATIONAL ID:


**Country** – Defaults to *USA*.

**National ID Type Description** – Defaults to *PR - Social Security Number*.

**National ID** (Social Security Number) – Enter the Social Security Number. It is not necessary to include punctuation; the number is formatted by the system.

**Primary ID** – Defaults to checked.

### USA:

Click on  **USA**. This expands the area so you can enter ethnic group.

**Ethnic Group** – Choose the appropriate option from the drop down list.

-----

Click on the [Job Data](#) hyperlink to continue the hiring process and enter Job Data information.

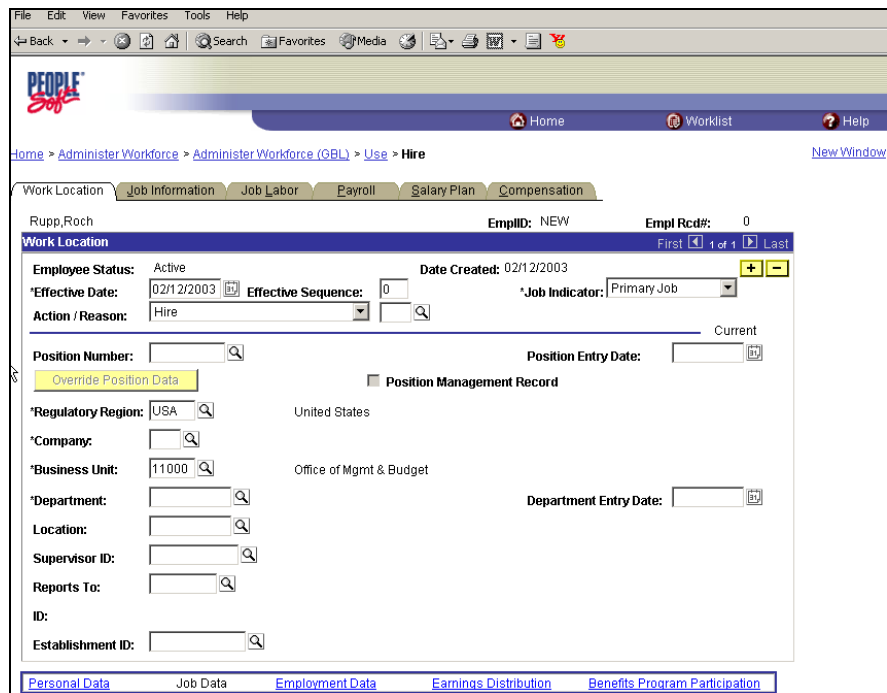
## JOB DATA

After you have entered the employee's personal information, the next step is to enter the job information.

The Job Data pages are used to record and access core information about the employee's job. These pages are the equivalent of an electronic personnel file. A history of the events, which occur during employment, (e.g. Promotions, Transfers, Terminations, etc.) is stored in Job Data.

The system displays the employee's name, Employee ID (*NEW*), and the employment record number, based on the information that you entered on the **Personal Data - Name** page.

Once you click the Job Data hyperlink, the **Work Location** page will be displayed.



File Edit View Favorites Tools Help

Back Forward Stop Search Favorites Media Print Mail

PEOPLE Soft

Home Worklist Help

Home > Administer Workforce > Administer Workforce (GBL) > Use > Hire

Work Location Job Information Job Labor Payroll Salary Plan Compensation

Rupp,Roch EmplID: NEW Empl Rcd#: 0

Work Location First 1 of 1 Last

Employee Status: Active Date Created: 02/12/2003

\*Effective Date: 02/12/2003 Effective Sequence: 0 \*Job Indicator: Primary Job

Action / Reason: Hire

Position Number: Position Entry Date: Current

Override Position Data Position Management Record

\*Regulatory Region: USA United States

\*Company:

\*Business Unit: 11000 Office of Mgmt & Budget

\*Department: Department Entry Date:

Location:

Supervisor ID:

Reports To:

ID:

Establishment ID:

Personal Data Job Data Employment Data Earnings Distribution Benefits Program Participation

## WORK LOCATION PAGE


**Effective Date** – The effective date defaults from the **Personal Data** pages.

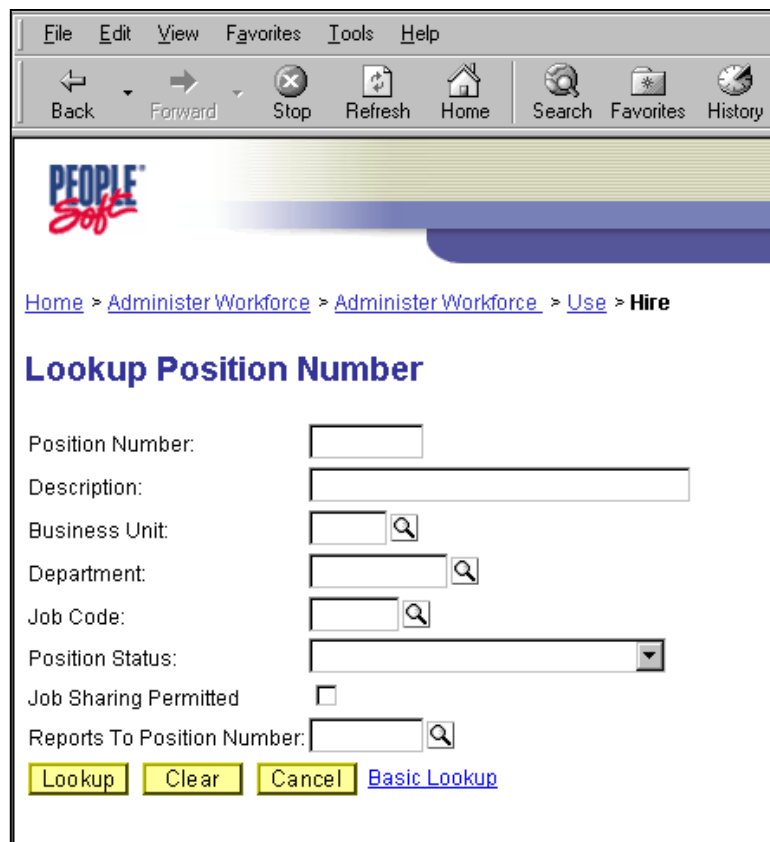
**Effective Sequence** – For the new hire row this value will always default to 0 (zero).

**Job Indicator** – This defaults to *Primary* for new hires.

**Action** – Defaults to *Hire* for new employees.

**Reason** – Select the appropriate choice from lookup.

**Position Number** – Enter the position number that is on the requisition or select a position number from the position lookup page by clicking on  beside the **Position Number** field. The system displays the following lookup page.



File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites History


**PEOPLE Soft**


[Home](#) > [Administer Workforce](#) > [Administer Workforce](#) > [Use](#) > [Hire](#)


### Lookup Position Number

Position Number:

Description:


Business Unit:  

Department:  

Job Code:  

Position Status:

Job Sharing Permitted: ☐

Reports To Position Number:  

[Lookup](#) [Clear](#) [Cancel](#) [Basic Lookup](#)

Enter information in one of the fields in which you would like to search by and click **Lookup**. Click on the appropriate position and the system populates the **Position Number** field with your selection.

When you tab out of the **Position Number** field, the system automatically fills in the **Position Entry Date** field with the effective date. The system populates several fields from the Position Data table. This is why verifying that the position data is correct before beginning the hiring process is so important

When a **Position Number** is input, the following fields populate on the **Work Location** page:

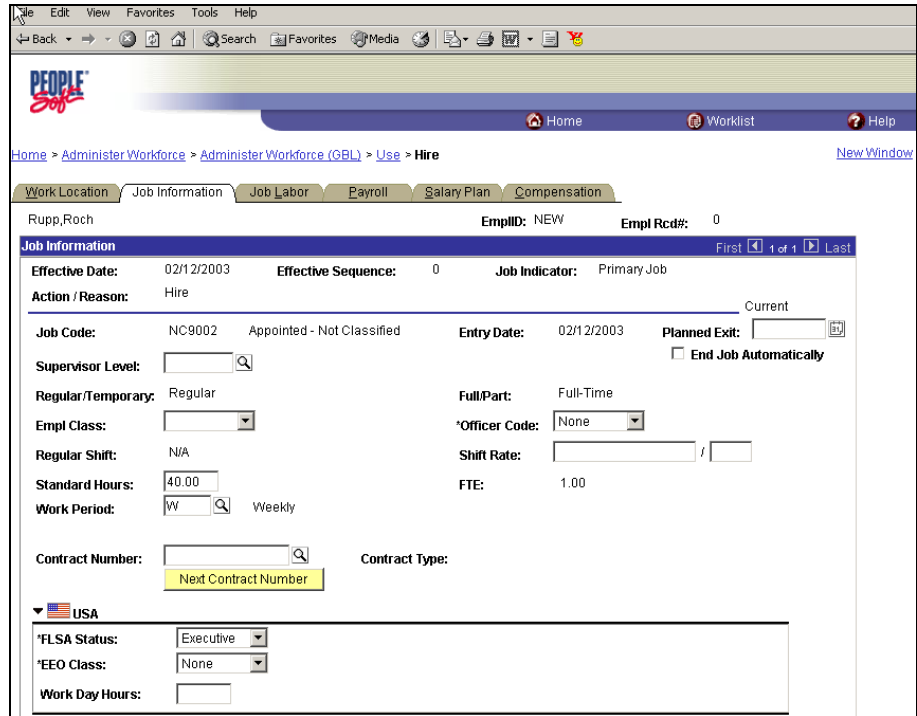
- **Regulatory Region** – Defaults to *USA*.
- **Company** – Defaults to *ND*.
- **Business Unit** – Defaults to *your business unit*.
- **Department** – Defaults to the department to which the employee belongs.
- **Entry Date** (to the right of **Department**) – Indicates the date on which the employee begins work for this department.
- **Location** – Defaults the code used to identify the physical location where the employee will be performing their job.
- **Reports To** – Not currently being used.
- **Establishment ID** – Not currently used.

---

**Note:** There may be instances in which the defaulted information from the position number in the above fields is not correct. The information should be corrected in manage positions where possible. If the information in manage positions does not pertain to all the employees in that position (ex. temporary positions) you may click on the override position data button which will open up these fields for entry. It is very important that you click on the override position data button when you are finished to close these fields again. **If you don't close these fields, the link between position data and job data is broken.**

---

Click the **Job Information** tab and the following page will appear.



PeopleSoft  
Home > Administer Workforce > Administer Workforce (GBL) > Use > Hire

Work Location / Job Information / Job Labor / Payroll / Salary Plan / Compensation

Rupp,Roch EmplID: NEW Empl Rcd#: 0

**Job Information** First 1 of 1 Last

Effective Date: 02/12/2003 Effective Sequence: 0 Job Indicator: Primary Job

Action / Reason: Hire

Job Code: NC9002 Appointed - Not Classified Entry Date: 02/12/2003 Planned Exit:  ☐ End Job Automatically

Supervisor Level:

Regular/Temporary: Regular Full/Part: Full-Time

Empl Class:  \*Officer Code:

Regular Shift: N/A Shift Rate:  /

Standard Hours: 40.00 FTE: 1.00

Work Period:  Weekly

Contract Number:  Contract Type:

Next Contract Number

USA

\*FLSA Status:  Executive

\*EEO Class:  None

Work Day Hours:

## JOB INFORMATION PAGE

The following fields populate from the **Position Number** entered on the previous page:

- **Job Code** – Identifies the job the employee performs.
- **Entry Date** – Indicates the date the employee begins work in this job.
- **Planned Exit** – If you know at the time the employee is hired when the employees last day of work is, you may enter that date here. This may be used for information only if the accompanying box (“end job automatically”) is checked no. **Do not check this box without notifying OMB first.**
- **Supervisor Level** – Not currently being used.
- **Regular/Temporary** and **Full/Part Time** – Defines the type of employment.
- **Empl Class** – Not currently being used.

**Officer Code** – Defaults to *None*.

**Regular Shift** – The State of North Dakota is not using regular shift.

**Shift Rate** – The State of North Dakota is not using the **Shift Rate** fields for tracking information. Shift information is entered on the payline.

**Standard Hours** – The number of hours per week that the employee will work. A value defaults from the position.

**FTE** – Is defaulted according to the employee's standard hours.  
(Example: If the standard hours are 20, the FTE will be .5)

**Work Period** – The standard time period in which employees must complete the standard hours. This should always be W for Weekly.

**Contract Number** – Not currently being used.

To access the **FLSA Status** and **EEO Class** fields, click on  **USA** to expand the section.

**FLSA Status** – The system fills in this field based on the job code assigned to this employee. FLSA status indicates whether this job is exempt or nonexempt according to the Fair Labor Standards Act. FLSA status also helps determine benefits eligibility in PeopleSoft Benefits Administration.

**EEO Class** – Not currently being used. Should default to none.

**Work Day Hours** – Workday hours are standard hours divided by 5. Only required if FLSA status is nonexempt. (Example: If standard hours is 40, the work day hours should be 8.)

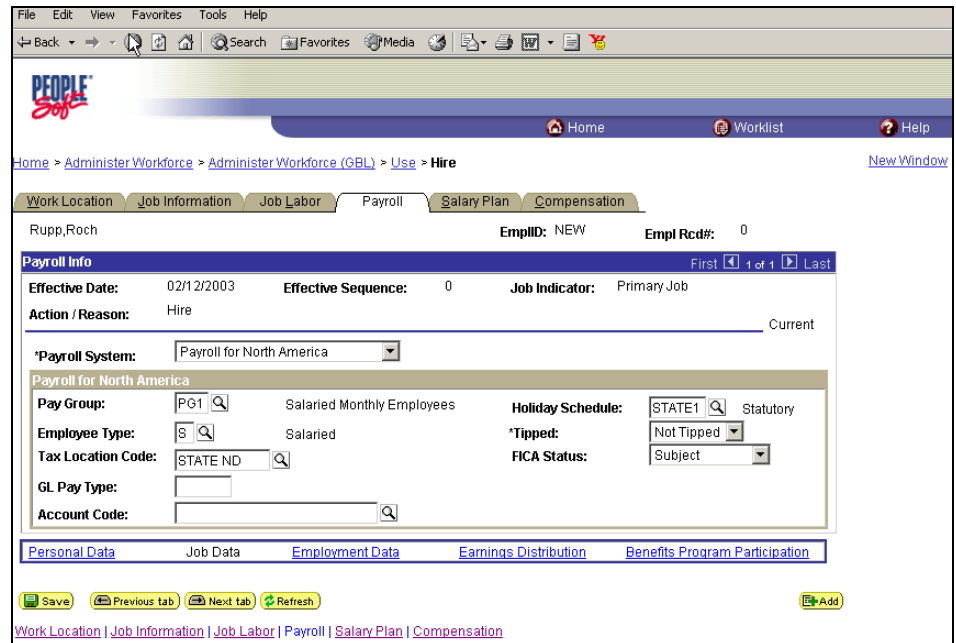
---

**Note:** There may be instances in which the defaulted information from the position number in the above fields is not correct. The information should be corrected in manage positions where possible. If the information in manage positions does not pertain to all the employees in that position (ex. temporary positions) you may click on the override position data button which will open up these fields for entry. It is very important that you click on the override position data button when you are finished to close these fields again. **If you don't close these fields, the link between position data and job data is broken.**

---


**Note:** The Job Labor tab is not used.

Click the **Payroll** tab and the following page will appear.



## PAYROLL PAGE

**Payroll System** – Defaults to *Payroll for North America*.

**Pay Group** – Enter the pay group or click on  to list the pay group codes. Once the pay group has been entered, the following information defaults:

- **Holiday Schedule** – Identifies the paid holidays for which an employee is eligible. Need to verify that the default is correct for that employee.
  - **State1** is the statutory holidays.
  - **None** is no holidays.
- **Employee Type** – Records how the employee reports time. Examples would be Hourly or Salaried. Need to verify that the default is correct for the employee.

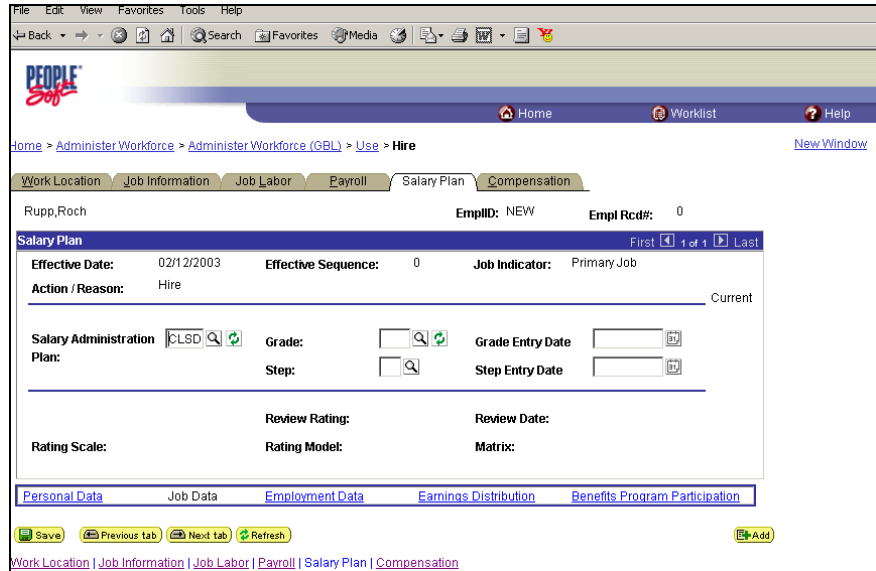
**Tax Location Code** – Lists the code used to identify the county in which the employee works.

**FICA Status**– Indicates whether the employee is exempt, subject, or subject to Medicare only. This field defaults to *Subject*.

**GL Pay Type-** North Dakota is not using this field. Leave this field blank.

**Account Code** - North Dakota is not using this field. Leave this field blank.

Click on the **Salary Plan** tab and the following page will appear.



## SALARY PLAN PAGE

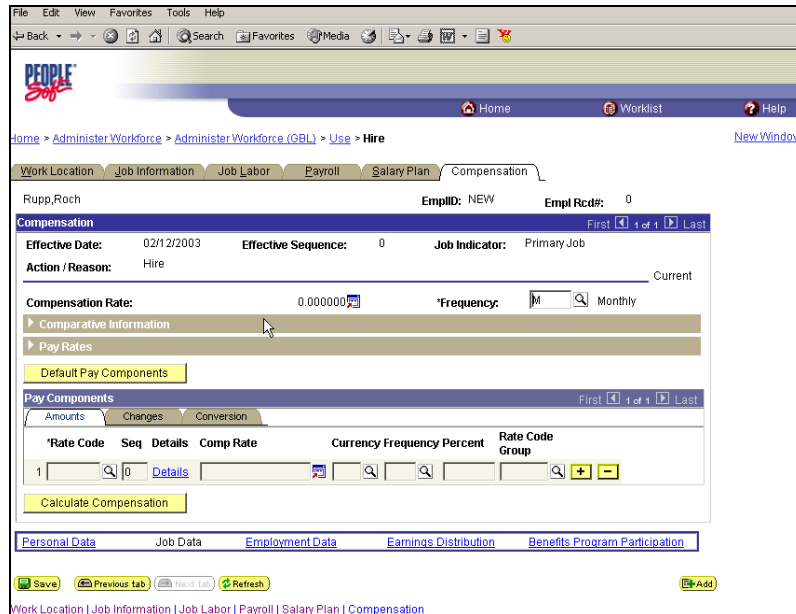
**Salary Administration Plan & Grade** – Used to tie together a collection of salary grades for which groups of similar employees will be eligible. These fields default from **Position Data**.

**Grade Entry Date** – Indicates the date on which the employee is first compensated from the **Salary Grade**.

**Step** – Is not being used at this time.

**Rating Scale, Review Rating & Review Date** – Used to rate the employee during the hiring process. These fields are not applicable to North Dakota.

Click on the **Compensation** tab and the following page will appear.



## COMPENSATION PAGE

**Comp Frequency** - Defaults to *M* for Monthly or *H* for Hourly.

**Rate Codes** – Choose from search list. (NAANNL does not apply to the State.) The description will indicate which rate code to use.

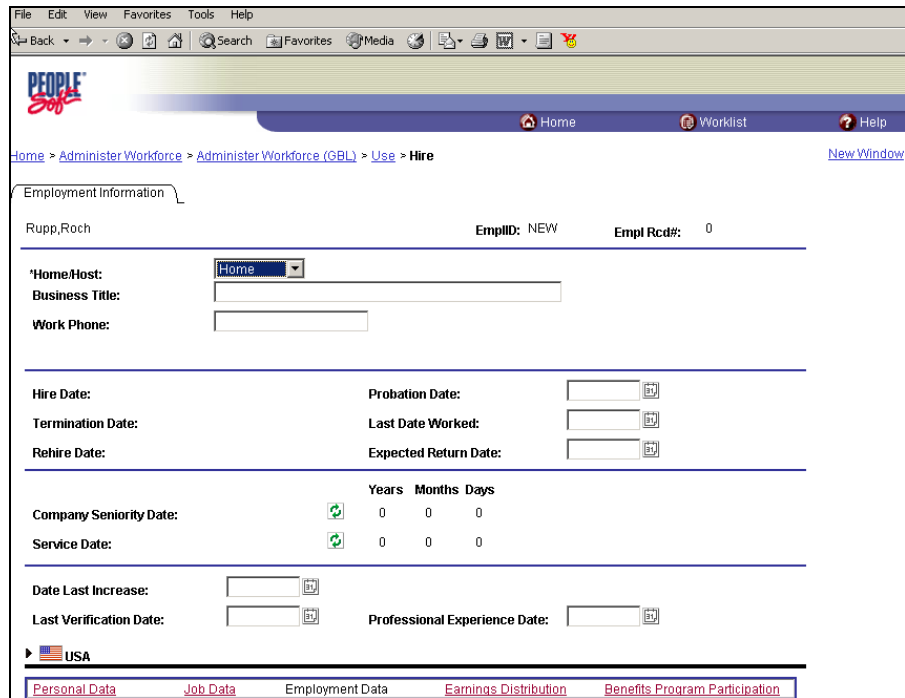
1. *Compensation*: Enter compensation amount if not defaulted from the rate code.
2. *Currency*: Defaults to USD (US Dollars).
3. *Frequency and Percent*: Defaults from rate code.
4. *Rate Code Group*: Not currently being used.

Click on Calculate Compensation button before save.

Click on the Employment Data hyperlink to continue the hiring process and enter Employment Data information.

## EMPLOYMENT DATA

When you click on the [Employment Data](#) hyperlink, the following page will appear.



The screenshot shows a web browser window displaying the PEOPLE SOFT application. The breadcrumb trail is: Home > Administer Workforce > Administer Workforce (GBL) > Use > Hire. The page title is "Employment Information". The employee name is "Rupp, Roch", and the employee ID is "NEW". The employee record number is "0". The "Home/Host" dropdown menu is set to "Home". The "Business Title" and "Work Phone" fields are empty. The "Hire Date", "Termination Date", and "Rehire Date" fields are empty. The "Probation Date", "Last Date Worked", and "Expected Return Date" fields are empty. The "Company Seniority Date" and "Service Date" fields are empty. The "Date Last Increase" and "Last Verification Date" fields are empty. The "Professional Experience Date" field is empty. The "Years", "Months", and "Days" fields are all set to "0". The "USA" flag is selected. The bottom navigation bar includes links for "Personal Data", "Job Data", "Employment Data", "Earnings Distribution", and "Benefits Program Participation".

### EMPLOYMENT INFORMATION PAGE

The **Employment Information** components are used to record employment information such as business title and work phone.

**\*Home/Host** – Defaults to *Home*.

**Business Title** – Defaults from Position Data.

**Work Phone** – Enter the employees work telephone number.

**Hire Date** - The system displays this date after you complete and save the hire component. This date is the same date as the effective date in the Job Data component.

**Probation Date** – Enter the end date of the new employee's probation/provisional period.

**Termination Date** - The system displays this date from the Job Data component when an employee terminates.

**Last Day Worked** – The system displays the day before the termination effective date in the Job Data component.

**Rehire Date** – The system displays the rehire date from the Job Data component when you rehire an employee.


**Expected Return Date** – The system displays the return date based on the action selected in the Job Data component. (Example: Leave of Absence)

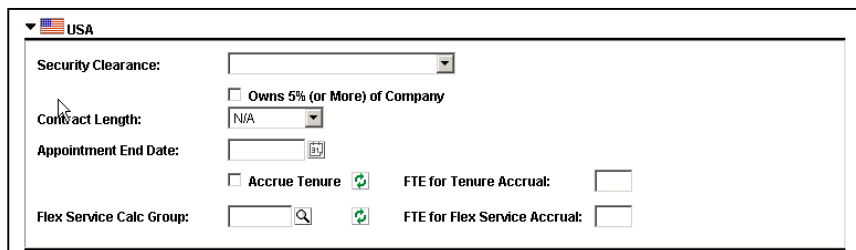
**Company Seniority Date & Service Date** – Defaults when the record is saved. The **Company Seniority Date** is the continuous service date and is used for service award pin recognition. The **Service Date** is used for leave accrual. Once you have completed the hire process and click on save, you should return to the employment data page and enter the first day of the month of the hire to accrue the appropriate accrual of leave hours.

**Date Last Increase** – When you change an employee's compensation rate, the system populates this field with the effective date of this change.

**Last Verification Date** – Not currently being used.

**Professional Experience Date** – Not currently being used.

**Note:** If you are hiring a temporary/seasonal employee, click the  **USA** to expand the section as shown below.



The screenshot shows a form titled "USA" with a dropdown arrow. The form contains the following fields and options:

- Security Clearance:** A dropdown menu.
- Contract Length:** A dropdown menu showing "N/A".
- Appointment End Date:** A date input field with a calendar icon.
- Flex Service Calc Group:** A dropdown menu with a search icon.
- ☐ Owns 5% (or More) of Company
- ☐ Accrue Tenure (with a green checkmark icon)
- FTE for Tenure Accrual:** A numeric input field.
- FTE for Flex Service Accrual:** A numeric input field.

**Appointment End Date** – Enter the expected end date for the temporary/seasonal position.

## JOB EARNINGS DISTRIBUTION

When you click on the [Earnings Distribution](#) hyperlink, the following page will appear.

Home > [Administer Workforce](#) > [Administer Workforce \(GBL\)](#) > [Use](#) > [Hire](#)

Job Earnings Distribution

EmplID: NEW      Empl Rcd#: 0

**Earnings Distribution Type** First 1 of 1 Last

Effective Date: 03/18/2003      Effective Sequence: 0      Job Indicator: Primary Job

Action / Reason: Hire Current

Standard Hours: 40.00      Work Period: W Weekly

Compensation Rate:      Comp Freq: A Annual

\*Earnings Distribution Type: None

**Job Earnings Distribution** First 1 of 1 Last

Position	Unit	Department	Job Code	Shift	*Earn Code
				N/A	

GL Pay Type      Account Code      Compensation Rate      Std Hrs      Distrib %

Personal Data      Job Data      Employment Data      Earnings Distribution      Benefits Program Participation

### JOB EARNINGS DISTRIBUTION PAGE

The Job Earnings Distribution earnings code will need to be verified for each employee.

Please verify the following:

- The earnings code for the PG1(& MJ1) pay group for salaried employees is defaulted to earnings code S01 for regular earnings. If the employee is to receive temporary earnings, the earnings code needs to be changed to S02 for temporary earnings on the job earnings distribution page.
- The earnings code for the PG2 pay group for hourly employees is defaulted to earnings code S02 for temporary earnings. If the employee is to receive regular earnings, the earnings code needs to be changed to S01 for regular earnings on the job earnings distribution page.
  - If the defaulted information is correct, you do not have to change anything.
  - If the earnings code needs to be changed, you need to do the following:
    - Earnings Distribution Type – Select by percent.
    - Earn Code – Change to proper earnings code (S01 or S02)
    - Distrib – type is 100% for distribution.

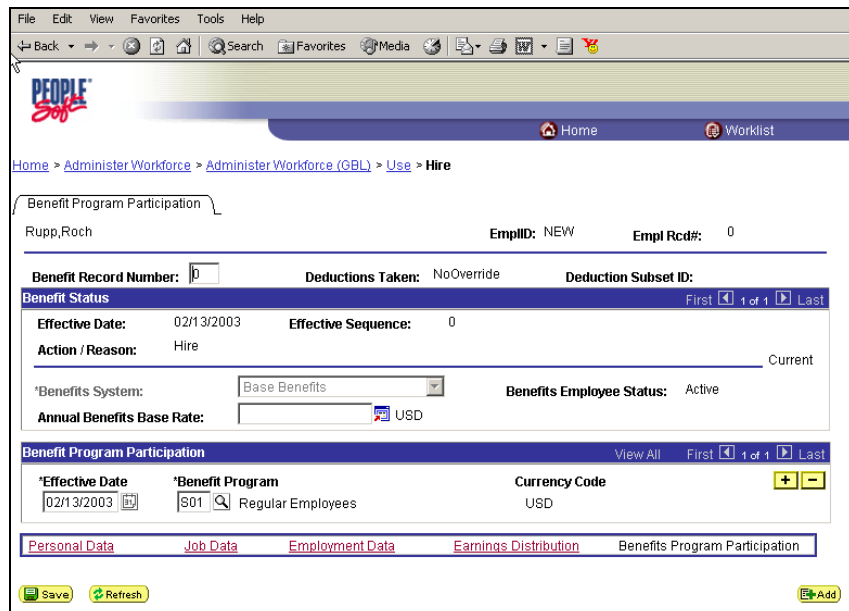
This will ensure that your employee's salaried for hourly base pay is paid using the correct earnings code.

Click on the [Benefit Program Participation](#) hyperlink to continue the hiring process and enter Benefit Program Participation data.

## BENEFITS PROGRAM PARTICIPATION

The **Benefit Program Participation** page specifies the benefit program the new employee is enrolling in.

When you click on the [Benefits Program Participation](#) hyperlink, the following page will appear.



File Edit View Favorites Tools Help

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PEOPLE SOFT

Home Worklist

Home > Administer Workforce > Administer Workforce (GBL) > Use > Hire

Benefit Program Participation

Rupp,Roch EmplID: NEW Empl Rcd#: 0

Benefit Record Number: 0 Deductions Taken: NoOverride Deduction Subset ID:

Benefit Status First 1 of 1 Last

Effective Date: 02/13/2003 Effective Sequence: 0

Action / Reason: Hire Current

\*Benefits System: Base Benefits Benefits Employee Status: Active

Annual Benefits Base Rate: USD

Benefit Program Participation View All First 1 of 1 Last

*Effective Date	*Benefit Program	Currency Code
02/13/2003	S01 Regular Employees	USD


Personal Data Job Data Employment Data Earnings Distribution Benefits Program Participation

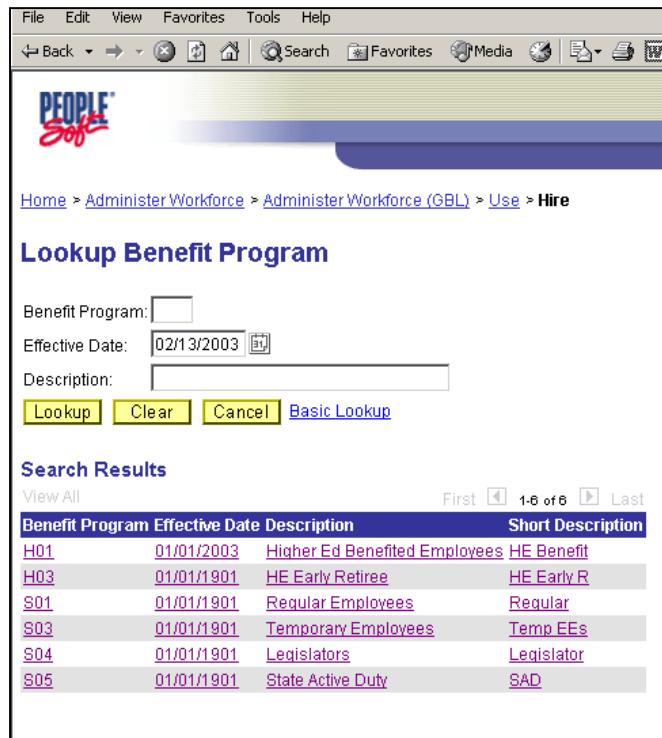
Save Refresh Add

## BENEFIT PROGRAM PARTICIPATION PAGE

**Benefits System** – Defaults to *Base Benefits*.

**Effective Date** – The date the benefit program will take effect for the new employee. (This will most likely be the employee's hire date.)

**Benefit Program** – Select a benefit program from the list of codes for which the employee is eligible. You can enter the value, or use the lookup feature by clicking the  to the right of the **Benefit Program** field.



Home > Administer Workforce > Administer Workforce (GBL) > Use > Hire

### Lookup Benefit Program

Benefit Program:

Effective Date: 02/13/2003

Description:


[Basic Lookup](#)

#### Search Results

[View All](#) First 1-6 of 6 Last

Benefit Program	Effective Date	Description	Short Description
H01	01/01/2003	Higher Ed Benefited Employees	HE Benefit
H03	01/01/1901	HE Early Retiree	HE Early R
S01	01/01/1901	Regular Employees	Regular
S03	01/01/1901	Temporary Employees	Temp EEs
S04	01/01/1901	Legislators	Legislator
S05	01/01/1901	State Active Duty	SAD

Benefit Program Name	Description
H01	HE Benefited Employees
H03	HE Early Retiree
S01	Regular Employees
S03	Temporary Employees
S04	Legislators
S05	State Active Duty

Click  to save all data entered. You will now need to add Emergency Contacts, Worker's Compensation, and Driver's License information as described in the following pages.

---

**Note:** You may want to make note of the employee ID number the system has assigned the new employee. You may need this number to initiate the Emergency Contact, Worker's Compensation, and Driver's License data entry processes.

---



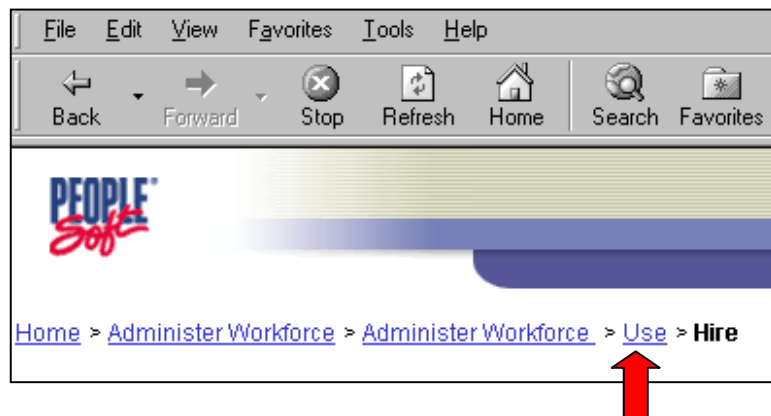
---

**Note:** Once you have completed the hire process and click on save, you should return to the employment data page and enter the first day of the month of the hire to accrue the appropriate accrual of leave hours.

---

## EMERGENCY CONTACT

To enter an employee's emergency contact information, click **> Use >** in the navigational breadcrumb as shown by the arrow below.



Click the [Emergency Contact](#) link to display the **Contact Address/Phone** page.

The screenshot shows the 'Emergency Contact' form for employee Rupp, Roch (Employee ID: 0000250). The form has two tabs: 'Contact Address/Phone' and 'Other Phone Numbers'. The 'Contact Address/Phone' tab is active. The form includes the following fields and options:

- \*Contact Name:** Text input field.
- \*Relationship to Employee:** Dropdown menu (set to 'Other') and a checkbox for 'Primary Contact'.
- Same Address as Employee:** Checkbox.
- Same Phone as Employee:** Checkbox.
- Contact Address:**
  - Country:** Text input field (set to 'USA') and a dropdown menu (set to 'United States').
  - Address 1:** Text input field.
  - Address 2:** Text input field.
  - Address 3:** Text input field.
  - City:** Text input field.
  - County:** Text input field.
  - State:** Text input field.
  - Postal Code:** Text input field.
- ContactPhone:**
  - Phone:** Text input field.

At the bottom of the form, there are buttons for 'Save', 'Return to Search', 'Next in List', and 'Previous in List'.


---

**Note:** The PeopleSoft system uses the last employee you were working with. Therefore, it will not display a search page. The system displays the Emergency Contact page for the new employee directly.

If, for some reason, the **Emergency Contact** search page is displayed, see the section marked Emergency Contact Search Page later in this section (marked with a \*\*).

---

**Contact Name** – Enter the name (last name, first name) of the emergency contact person (mixed case).

**Relationship to Employee** – Click the  to select the appropriate value from the drop down selections.


**Primary Contact** – Click the box if this person will be the primary emergency contact.

If the contact person has the same address and phone number as the new employee, check the **Same Address/Phone as Employee** box. If not, enter the address information as appropriate.

**Phone** – Enter the phone number for the emergency contact person.

If you need to enter additional phone numbers for the contact person, click the **Other Phone Numbers** tab to display the page.


The screenshot shows a web browser window with the PEOPLE Soft application. The breadcrumb trail is: Home > Administer Workforce > Administer Workforce (GBL) > Use > Emergency Contact. The form is for employee Rupp, Roch (Employee ID: 0000250). It has two tabs: 'Contact Address/Phone' (selected) and 'Other Phone Numbers'. The 'Emergency Contact' section shows 'Contact Name: Greg Griffith' and 'Relationship to Employee: Other'. There is a checkbox for 'Primary Contact' which is checked. Below this is a section titled 'Other Phone Numbers for Emergency Contact' with a table containing two columns: 'Phone Type' (a dropdown menu) and 'Phone' (a text input field). At the bottom of the form are buttons for 'Save', 'Return to Search', 'Next in List', and 'Previous in List'.

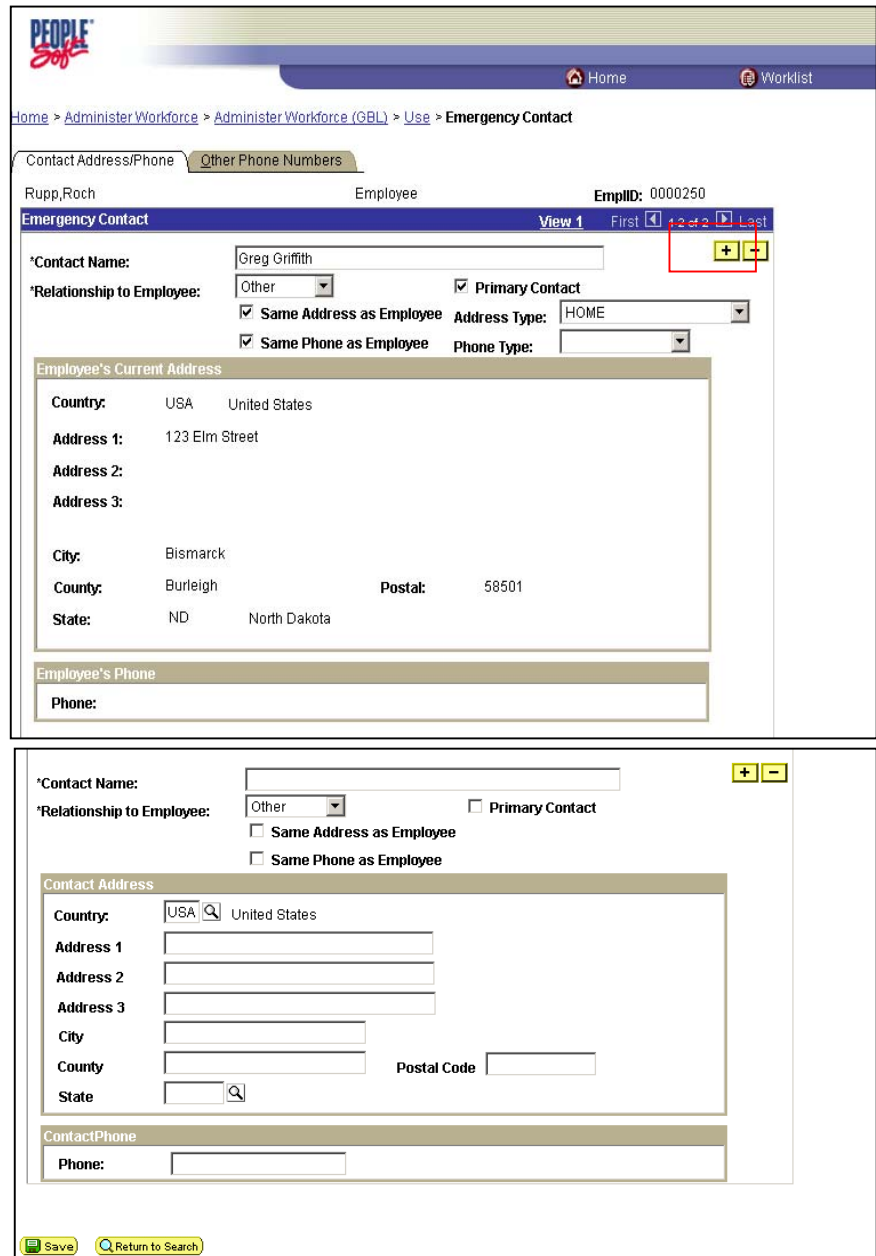
**Phone Type** – Click the  to select the type of phone number (e.g. cellular, pager, etc.) from the drop down selections.

**Phone** – Enter the phone number for the type selected.

If you are finished entering contact information, click .

## ENTERING ADDITIONAL EMERGENCY CONTACTS

To enter additional emergency contacts, click on the  across from the **Contact Name** field. A new emergency contact record will appear *below* the original as shown in the following screen shot.



PEOPLE Soft


Home Worklist

Home > Administer Workforce > Administer Workforce (GBL) > Use > Emergency Contact

Contact Address/Phone Other Phone Numbers

Rupp, Roch Employee EmplID: 0000250

Emergency Contact View 1 First 1 of 2 Last

\*Contact Name: Greg Griffith 

\*Relationship to Employee: Other ☒ Primary Contact

☒ Same Address as Employee Address Type: HOME

☒ Same Phone as Employee Phone Type:

Employee's Current Address

Country: USA United States

Address 1: 123 Elm Street

Address 2:

Address 3:



City: Bismarck

County: Burleigh Postal: 58501

State: ND North Dakota

Employee's Phone

Phone:

\*Contact Name:  

\*Relationship to Employee: Other ☐ Primary Contact

☐ Same Address as Employee

☐ Same Phone as Employee

Contact Address

Country: USA United States


Address 1:

Address 2:

Address 3:

City:

County: Postal Code:

State: 


ContactPhone

Phone:

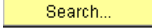
Save Return to Search

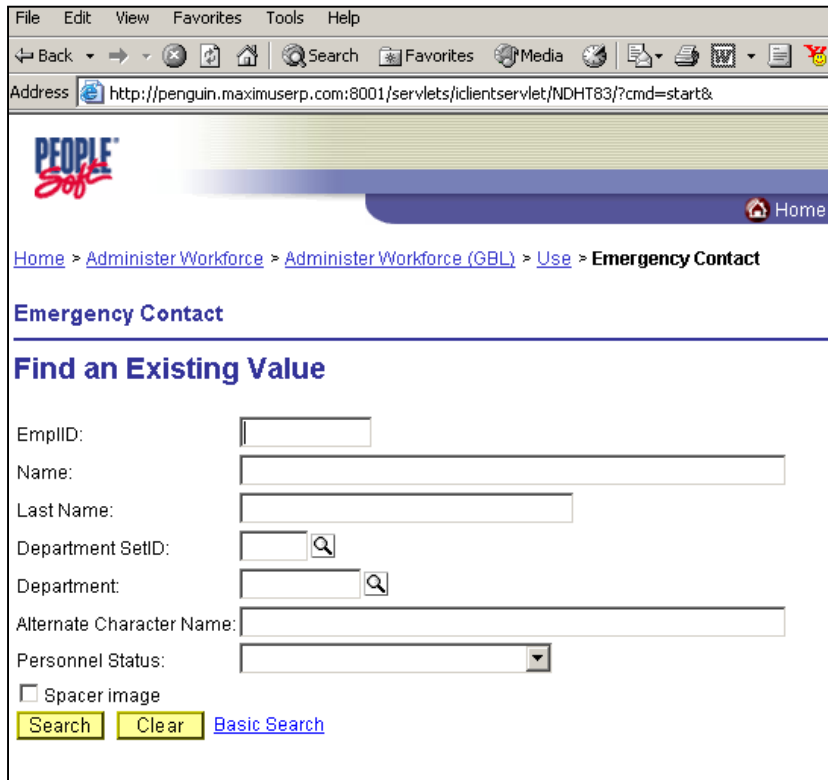
Enter the new contact information as described earlier.

To enter additional phone numbers for any of the emergency contacts, follow the same procedures by clicking the **+** across from the **Phone Type** and **Phone** fields under the **Other Phone Numbers** Tab.

Click  to save all emergency contact information.

## **\*\* EMERGENCY CONTACT SEARCH PAGE**

If you click on **> Use >** in the navigational breadcrumb and the Emergency Contact search page is displayed (as shown below), enter the new employee's ID number into the **EmplID** field and click . The Emergency Contact page will be displayed as shown previously.



File Edit View Favorites Tools Help

Back Forward Stop Reload Search Favorites Media Print Preview W Print W

Address <http://penguin.maximuserp.com:8001/servlets/iclientervlet/NDHT83/?cmd=start&>

**PEOPLE Soft** Home

[Home](#) > [Administer Workforce](#) > [Administer Workforce \(GBL\)](#) > [Use](#) > **Emergency Contact**


**Emergency Contact**


**Find an Existing Value**

EmplID:

Name:

Last Name:



Department SetID:  

Department:  

Alternate Character Name:

Personnel Status:

☐ Spacer image

  [Basic Search](#)

## WORKERS' COMPENSATION

To enter an employee's Workers' Compensation information, click **>Use** **>** in the navigational breadcrumb.

Click the Workers' Compensation link to display the **Workers' Compensation** page.

Home > Administer Workforce > Administer Workforce (GBL) > Use > **Workers' Compensation**

Workers' Compensation

Person, Sally M Employee EmplID: 7006961 Empl Rcd#: 0

Workers' Compensation Code	Workers' Compensation Percent
1 8042	100

View All First 1 of 1 Last

Save Return to Search

**Workers' Compensation Code** – Enter the code that identifies the compensation class for the employee. Classes can be found through a lookup.

**Workers' Compensation Percent** – Enter the percent of the job assigned to each rate class (the percent totals must equal 100%).

---

**Note:** An employee can have a maximum of two Worker's Compensation codes with a combined percentage total of 100 percent.

---

## MAINTAINING EMPLOYEE INFORMATION

### OVERVIEW

When you administer your workforce, you'll spend the bulk of your time keeping a history of your employees' careers with your organization. The information you maintain is, for the most part, the same type of information that you enter to hire or add workers to your workforce.

Before you can view information on a particular person, you must have already created a human resources record for that person, in other words, already added the person into PeopleSoft Human Resources.

### OBJECTIVES

At the completion of this section, you will be able to view and update the following employee information:

3. Name
4. Address
5. Emergency Contacts
6. Driver's License
7. Pay Rate
8. General Comments

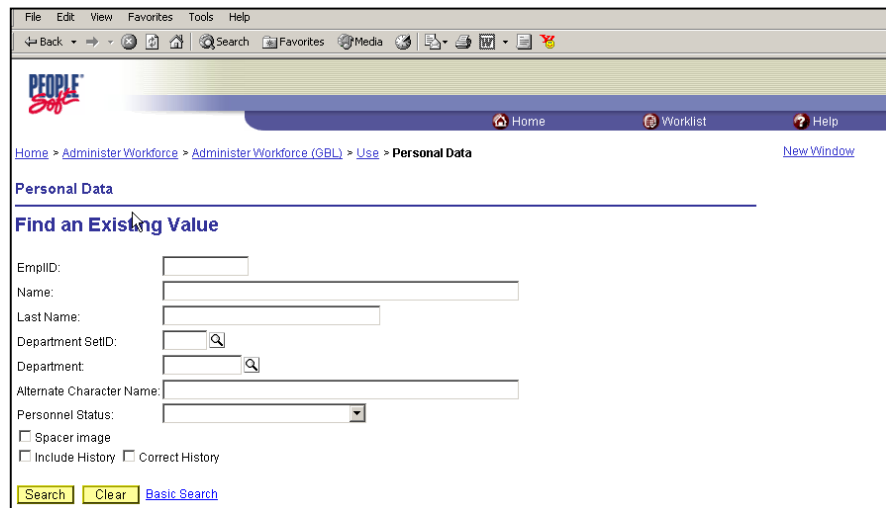
In addition, you will be able to process the following Job Data employee transactions:

1. Leave of Absence – Unpaid
2. Leave of Absence – Paid
3. FMLA Intermittent Leave
4. Return from Leave
5. Temporary Assignments
6. Promotion / Demotion
7. Hire Temporary as a Full Time Employee
8. Transfers
9. Retirement / Termination
10. Rehire

## UPDATING EMPLOYEE INFORMATION

### CHANGING PERSONAL DATA

To change an employee's personal information such as employee name and address, use the following navigation path: **Home > Administer Workforce > Administer Work Force (GBL) > Use > Personal Data**. The following page will appear.



File Edit View Favorites Tools Help

Back Search Favorites Media

PEOPLE SOFT

Home Worklist Help

Home > Administer Workforce > Administer Work Force (GBL) > Use > Personal Data [New Window](#)

**Personal Data**

**Find an Existing Value**

EmpID:

Name:

Last Name:

Department SetID:

Department:

Alternate Character Name:

Personnel Status:

☐ Spacer Image

☐ Include History ☐ Correct History

[Basic Search](#)

**Note:** All updates to employee information will begin with this search page. You may search by Employee ID, Name, Department, etc.

Once you have located the correct employee, the following page will appear.

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites Media Print Mail

PEOPLE Soft

Home Worklist Help

Home > Administer Workforce > Administer Workforce (GBL) > Use > Personal Data [New Window](#)

Name History Address History Personal History Identity Diversity

EmpID: 0000250 Employee

Name Type First 1 of 1 Last

Type of Name: Primary + -

Name History First 1 of 1 Last

Effective Date: 02/13/2003 + -

Format Using: USA United States Refresh the Name Field

Person Name

Prefix: Dr First: Roch Middle: Last: Rupp Suffix: Name: Rupp,Roch

Save Return to Search Next in List Previous in List Previous tab Next tab Refresh Update/Display Include History Correct History

Name History | Address History | Personal History | Identity Diversity

To make a change to either the employee's name or address click on the **+** across from the **Effective Date** field and the following page will appear.

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites Media Print Mail

PEOPLE Soft

Home Worklist Help

Home > Administer Workforce > Administer Workforce (GBL) > Use > Personal Data [New Window](#)

Name History Address History Personal History Identity Diversity

EmpID: 0000250 Employee

Name Type First 1 of 1 Last

Type of Name: Primary + -

Name History First 1 of 2 Last

Effective Date: 02/17/2003 + -

Format Using: USA United States Refresh the Name Field

Person Name

Prefix: Dr First: Roch Middle: Last: Rupp Suffix: Name: Rupp,Roch


Save Return to Search Next in List Previous in List Previous tab Next tab Refresh Update/Display Include History Correct History

Name History | Address History | Personal History | Identity Diversity

Notice that this **First 1 of 2 Last** is now shown. The first is the record that changes will be entered into, and the second is the latest information that was input for the employee.

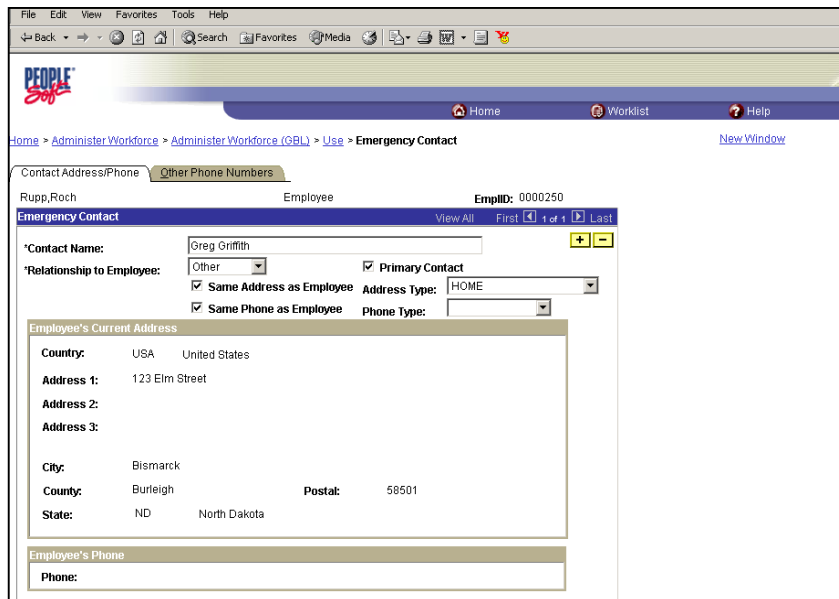
The **Effective Date** field defaults the system date. You can put future dates in as well. The effective date identifies when the changes went into effect (or will go into effect) and preserves the history of the changes by keeping the previous information in a separate record.

**Note:** Not all fields for an employee's personal data are effective dated. Changes to **Name**, **Address**, **Marital Status**, and whether an employee is a **Smoker** or **Non-Smoker** are all effective dated. Changes to any other fields in the Personal Data pages are overwritten and no history is kept. This includes phone numbers, educational information, etc.

Enter any name changes on the top record. Click on the **Address History** tab to make changes to the employee's address, mailing address, or phone number. Once all changes are made to an employee's personal data, click  to save the changes.

## EMERGENCY CONTACT

To enter or change an employee's emergency contact information, use the following navigation path: **Home > Administer Workforce > Administer Workforce (GBL) > Use > Emergency Contact**. The search page will appear as described above. Once you have selected the appropriate employee, the following page will appear.



File Edit View Favorites Tools Help

Back Forward Stop Search Favorites Media Print Mail

PEOPLE  
Soft

Home Worklist Help

Home > Administer Workforce > Administer Workforce (GBL) > Use > Emergency Contact [New Window](#)

Contact Address/Phone **Other Phone Numbers**

Rupp, Roch Employee EmpID: 0000250

**Emergency Contact** View All First 1 of 1 Last

\*Contact Name: Greg Griffith + -

\*Relationship to Employee: Other ☒ Primary Contact

☒ Same Address as Employee Address Type: HOME

☒ Same Phone as Employee Phone Type:

**Employee's Current Address**

Country: USA United States

Address 1: 123 Elm Street

Address 2:

Address 3:

City: Bismarck


County: Burleigh Postal: 58501

State: ND North Dakota


**Employee's Phone**

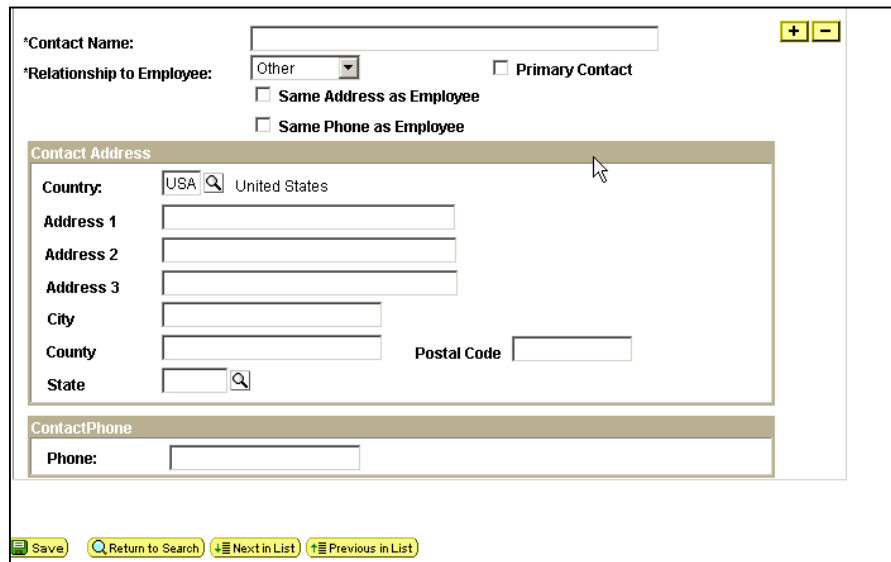
Phone:

### CHANGING CURRENT INFORMATION

To change the current Emergency Contact information, type the new information into the appropriate fields. Since Emergency Contact information is not effective dated, type over the existing information. Click on the **Other Phone Numbers** tab to change other phone numbers if necessary. When you are finished, click .

### ENTERING ADDITIONAL EMERGENCY CONTACTS

To enter additional emergency contacts, click on the  across from the **Contact Name** field. A new emergency contact record will appear below the original as shown in the following screen shot.



The screenshot shows a web form for entering emergency contact information. At the top right, there are '+' and '-' buttons. The form fields include:

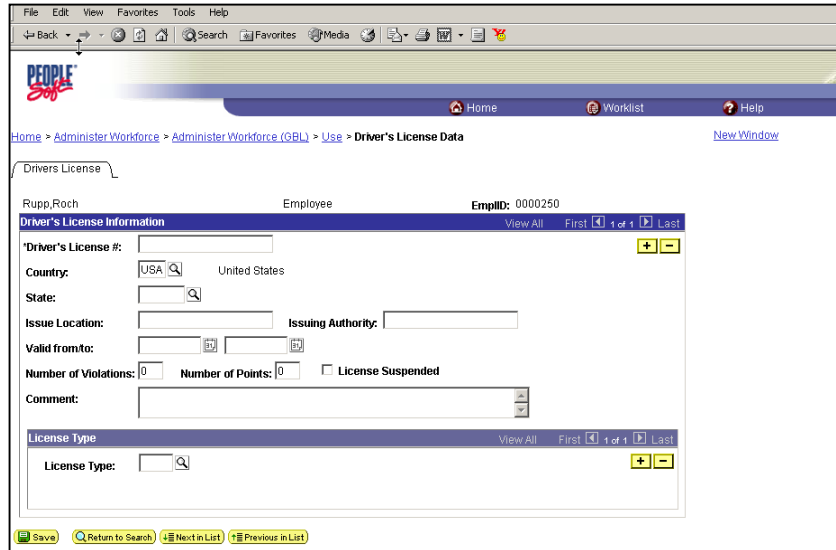
- \*Contact Name:** A text input field.
- \*Relationship to Employee:** A dropdown menu currently set to 'Other', with checkboxes for 'Primary Contact', 'Same Address as Employee', and 'Same Phone as Employee'.
- Contact Address:** A section with fields for Country (USA), Address 1, Address 2, Address 3, City, County, State, and Postal Code.
- ContactPhone:** A section with a 'Phone:' label and a text input field.

At the bottom of the form, there are navigation buttons: 'Save', 'Return to Search', 'Next in List', and 'Previous in List'.


Enter the new contact information and click .

## DRIVER'S LICENSE


To enter or change an employee's Driver's License information, use the following navigation path: **Home > Administer Workforce > Administer Workforce (GBL) > Use > Driver's License Data**. The search page will appear as described previously. Once you have selected the appropriate employee, the following page will appear.




## CHANGING CURRENT INFORMATION

To change the current Driver's License information, type the new information into the appropriate fields. As with Emergency Contact information, Driver's License information is not effective dated. To change the information, type over the previous entries. When you are finished, click .

## ENTERING ADDITIONAL DRIVER'S LICENSE INFORMATION

To enter additional Driver's License information, click on the  across from the **Driver's License #** field. A new Driver's License record will appear below the original.

Enter the new information and click .

To enter additional Driver's License types, follow the same procedures by clicking the  across from the **License Type** field in the License Type section.

## PAY RATE CHANGES

Use the Pay Rate Change pages to enter a salary change for an employee that isn't related to a change on the position. For example: if the salary grade or job code fields change, this update is completed on the position. The Pay Rate Change pages should only be used to update the compensation (i.e. service adjustments and step).

To process pay rate changes, use the following navigation path: **Home > Administer Workforce > Administer Workforce (GBL) > Use > Pay Rate Change**. The search page will appear as described previously. Once you have selected the appropriate employee, the following page will appear.

File Edit View Favorites Tools Help

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PEOPLE'S MAXIMUS

Home Worklist Help

Home > Administer Workforce > Administer Workforce (GBL) > Use > Pay Rate Change [New Window](#)

Employee Profile Salary Plan Compensation Job Earnings Distribution

Rupp, Roch Employee 0000250 Last Increase Dt: Rcd#:

Work Location First 1 of 1 Last

\*Effective Date: 02/13/2003 Effective Sequence: 0

Business Unit: The State of North Dakota STATE

Employee Status: Active

Action / Reason: Hire

Employee Type: Salaried

Company: ND - State of North Dakota

Pay Group: PG1 - Sal Month

Standard Hours: 40.00

Work Period: W Weekly

FTE: 1.00

Save Return to Search Update/Replay Include History Correct History


Employee Profile | Salary Plan | Compensation | Job Earnings Distribution

## EMPLOYEE PROFILE PAGE

To begin the Pay Rate change process, click on the **+** located across from the **Effective Sequence** field in the **Employee Profile** Tab. A new record will be created as shown by the

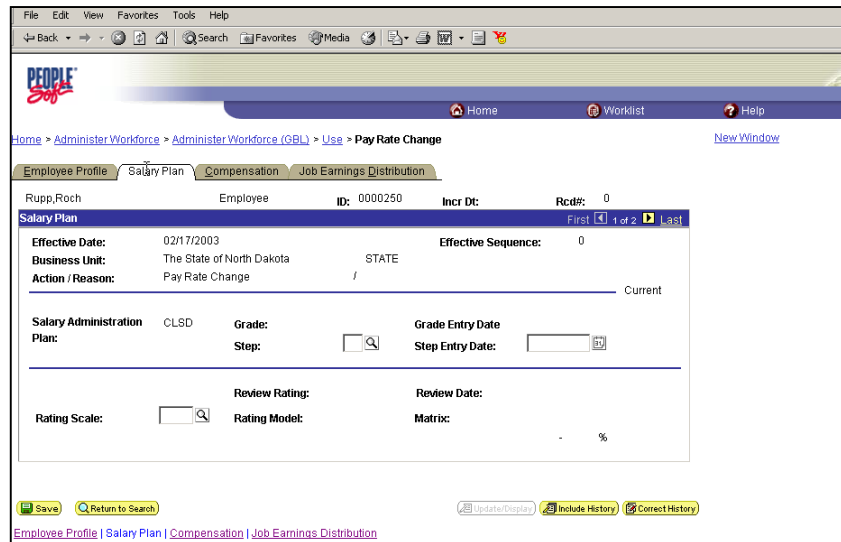
First 1 of 2 Last

The **Effective Date** field defaults in the current date. You can put future dates in as well. The effective date identifies when the changes went into effect (or will go into effect) and preserves the history of the changes by keeping the previous information in a separate record.

The **Action / Reason** field defaults to *Pay Rate Change* for the Action. Select a reason code by clicking on the  (i.e. service adjustment, step, etc.).

### SALARY PLAN PAGE

Click on the **Salary Plan** tab and the following page will appear.



File Edit View Favorites Tools Help

Back Search Favorites Media

PEOPLE Soft

Home Worklist Help

Home > Administer Workforce > Administer Workforce (GBL) > Use > Pay Rate Change [New Window](#)

Employee Profile Salary Plan Compensation Job Earnings Distribution

Rupp, Roch Employee ID: 0000250 Incr Dt: Rcd#: 0

Salary Plan First 1 of 2 Last

Effective Date: 02/17/2003 Effective Sequence: 0

Business Unit: The State of North Dakota STATE

Action / Reason: Pay Rate Change / Current

Salary Administration Plan: CLSD Grade: Step: Grade Entry Date Step Entry Date:

Rating Scale: Review Rating: Review Date: Rating Model: Matrix: - %

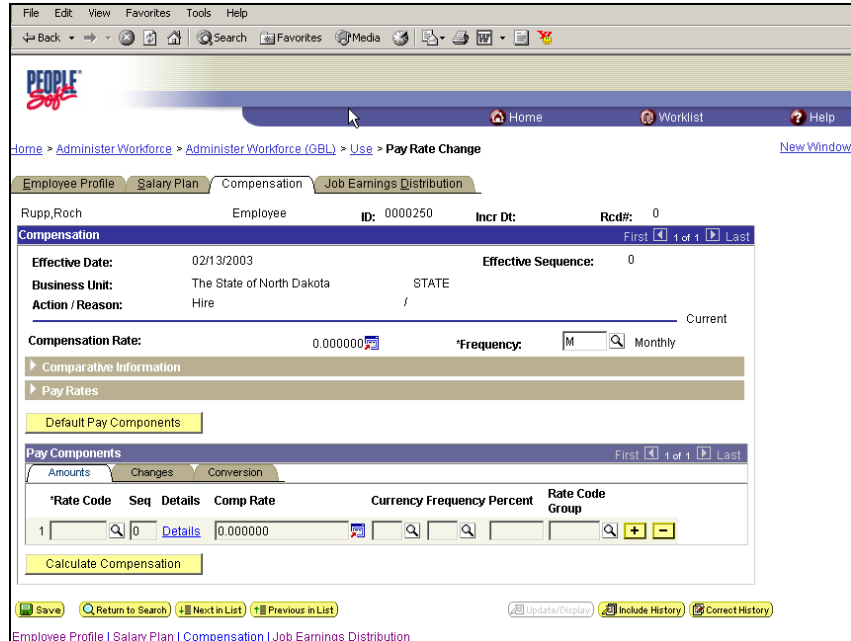
Save Return to Search Update/Display Include History Correct History

[Employee Profile](#) | [Salary Plan](#) | [Compensation](#) | [Job Earnings Distribution](#)

This page is currently not applicable.

## COMPENSATION PAGE

Click on the **Compensation** tab and the following page will appear.



File Edit View Favorites Tools Help

Back Forward Stop Search Favorites Media Print PDF Print Preview Help

PEOPLE SOFT

Home Worklist Help

Home > Administer Workforce > Administer Workforce (GBL) > Use > Pay Rate Change [New Window](#)

Employee Profile Salary Plan Compensation Job Earnings Distribution

Rupp, Roch Employee ID: 0000250 Incr Dt: Rcd#: 0

Compensation First 1 of 1 Last

Effective Date: 02/13/2003 Effective Sequence: 0

Business Unit: The State of North Dakota STATE

Action / Reason: Hire /

Current

Compensation Rate: 0.000000 \*Frequency: M Monthly

Comparative Information

Pay Rates

Default Pay Components

Pay Components First 1 of 1 Last

Amounts Changes Conversion

*Rate Code	Seq	Details	Comp Rate	Currency	Frequency	Percent	Rate Code Group
1	0	<a href="#">Details</a>	0.000000				

Calculate Compensation

Save Return to Search Next in List Previous in List Update/Display Include History Correct History

[Employee Profile](#) | [Salary Plan](#) | [Compensation](#) | [Job Earnings Distribution](#)

To enter a new pay rate, you can enter the rate code and the new compensation rate.

Click on the calculate compensation button.

Based on the compensation rate and frequency, the system calculates and displays the hourly, daily, monthly, and annual rate for the employee.

The compensation rate is entered in the **Comp Rate** field. To enter either a specific compensation change amount (e.g. a \$2000 increase) or a percentage change, click the **Changes** tab (as depicted by the arrow below) and enter the information in the appropriate fields.

The screenshot shows the PEOPLE Soft web application interface. The breadcrumb trail is: Home > Administer Workforce > Administer Workforce (GBL) > Use > Pay Rate Change. The 'Compensation' tab is selected. The employee information shows 'Rupp,Roch' with ID '0000250'. The 'Compensation' section displays 'Effective Date: 02/13/2003', 'Business Unit: The State of North Dakota', and 'Action / Reason: Hire'. The 'Compensation Rate' is '0.000000' and 'Frequency' is 'Monthly'. Below this, the 'Pay Components' section has tabs for 'Amounts', 'Changes', and 'Conversion'. A red arrow points to the 'Changes' tab. The 'Pay Components' table shows one component with 'Rate Code' '1', 'Seq' '0', and 'Comp Rate' '0.000000'. At the bottom, there are buttons for 'Save', 'Return to Search', 'Next in List', 'Previous in List', 'Update/Display', 'Include History', and 'Correct History'.

Click **Save** to save all Pay Rate Change information.

Click on > **Use** > in the navigational breadcrumb as depicted by the arrow below.

The screenshot shows the PEOPLE Soft web application interface. The breadcrumb trail is: Home > Administer Workforce > Administer Workforce > Use > Pay Rate Change. The 'Compensation' tab is selected. The 'Pay Components' section has tabs for 'Amounts', 'Changes', and 'Conversion'. A red arrow points to the 'Use' link in the breadcrumb trail.

## ADDING GENERAL COMMENTS

Use the **General Comments** page to enter miscellaneous comments about employees that are not incorporated in any other section of PeopleSoft Human Resources system.

Use the following navigation path to open the General Comments page:  
**Home > Administer Workforce > Administer Workforce (GBL) > Use > General Comments**. The search page will appear as described previously. Once you have selected the appropriate employee, the following page will appear.

The screenshot shows the PeopleSoft web interface. The browser window title is 'PeopleSoft'. The navigation bar includes 'Home', 'Worklist', and 'Help'. The breadcrumb trail is 'Home > Administer Workforce > Administer Workforce (GBL) > Use > General Comments'. The page title is 'General Comments'. Below the title, the employee name 'Rupp, Roch' and 'Employee' are displayed, along with 'EmpID: 0000250'. The 'General Comments' section has a 'View All' button and a list of 1 item. The form fields are: 'Comments By:' (a text box), 'Comment Date:' (a date picker), and 'Comment:' (a large text area). At the bottom, there are buttons for 'Save', 'Return to Search', 'Next in List', and 'Previous in List'.

The page pictured above depicts an employee who does not have any general comments entered for them. Therefore, you can begin entering data in the **Comments By**, **Comment Date**, and **Comment** fields. The **Comment** text field will hold up to 250 characters.

If you need to add a new row for comments (e.g. the Comment page is already filled out), click the **+** across from the **Comments By** field. This will create a new row below the existing comment.

Fill in the **Comments By**, **Comment Date**, and **Comment** fields and click on **Save**.

**Note:** Enter information that has been approved and is intended to become a part of the employee's permanent record.

## JOB DATA ACTIONS

### OVERVIEW

You will usually update job data by inserting new effective-dated rows into an existing employee record. Effective dates enable you to keep a complete chronological history of all your data and tables—whether you changed them years ago or want changes to go into effect months or years into the future. This enables you to analyze position data or employee records for particular periods of time.

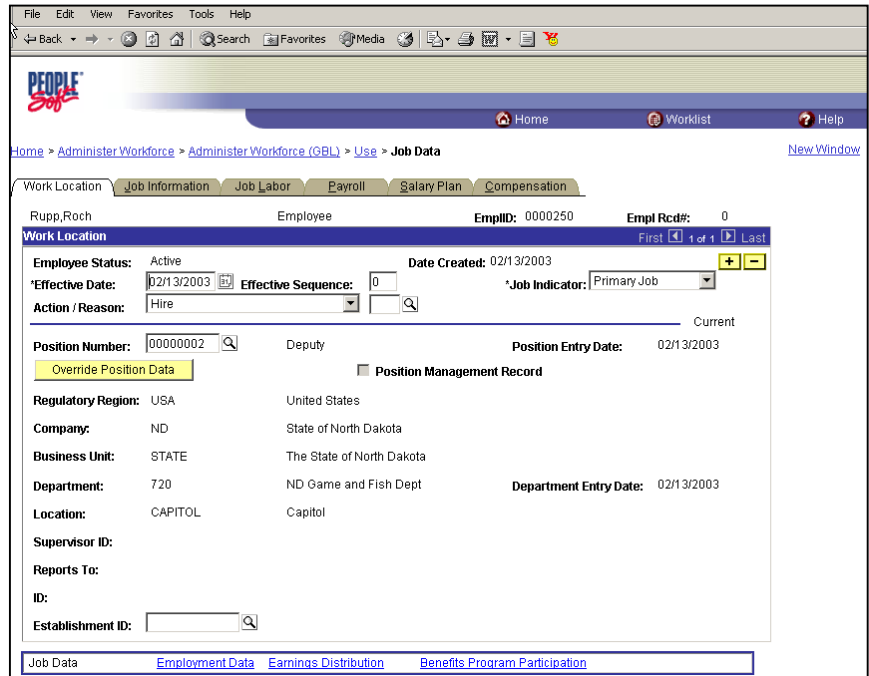
The system also uses effective dates to compare pages and tables to make sure that the prompt tables you see list only data that is valid as of the effective date of the page where you're working. For example, assume you create a new department code with an effective date of October 1, 2003. If you enter a new data row (or update an existing row) on the Job Data pages that have an effective date *before* October 1, 2003, you will not see the new code as a valid choice when you select a department because the new code has not yet taken effect.

When you enter a new data row, the system copies the contents of the previous row into the new row. This saves you the time of retyping information that stays the same. (Make sure you have the cursor on the data row you want to copy before you insert the new row.) The only new information you will see is the effective date, which defaults to the system date, which you can change if necessary.

**YOU MUST ENTER AN ACTION/REASON FOR EACH ACTION WITH THE APPROPRIATE SEQUENCE NUMBER. YOU CAN HAVE MORE THAN ONE ACTION PER EFFECTIVE DATE. FOR EXAMPLE: AN EMPLOYEE MAY BE RECLASSIFIED AND RECEIVE A PAY RATE CHANGE ON THE SAME EFFECTIVE DATE.**

## ACCESSING / CHANGING JOB DATA

To begin using the Job Data pages, use the following navigation path: **Home > Administer Workforce > Administer Work Force (GBL) > Use > Job Data**. The search page will appear as described previously. Once you have selected the appropriate employee, the following page will appear.



The screenshot displays the 'Job Data' page for employee Rupp, Roch. The page includes a navigation bar with links to Home, Worklist, and Help. Below the navigation bar, there are tabs for Work Location, Job Information, Job Labor, Payroll, Salary Plan, and Compensation. The 'Job Information' tab is selected. The page shows the following information:

- Employee:** Rupp, Roch
- EmpID:** 0000250
- Empl Rcd#:** 0
- Employee Status:** Active
- Effective Date:** 02/13/2003
- Effective Sequence:** 0
- Date Created:** 02/13/2003
- Action / Reason:** Hire
- Job Indicator:** Primary Job
- Position Number:** 00000002
- Position Entry Date:** 02/13/2003
- Regulatory Region:** USA
- Company:** ND
- Business Unit:** STATE
- Department:** 720
- Location:** CAPITOL
- Supervisor ID:**
- Reports To:**
- ID:**
- Establishment ID:**

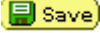
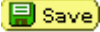
At the bottom of the page, there are links to Job Data, Employment Data, Earnings Distribution, and Benefits Program Participation.

Insert a new data row by clicking the **+** sign across from the **Date Created** field. A new data row will appear above the original.

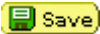
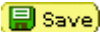
As stated earlier, the **Effective Date** field defaults to the current date.

The following Job Data scenarios begin with the assumption you have already selected the employee and inserted a new row.


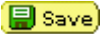
### ***ACTION 1: LEAVE OF ABSENCE (UNPAID LEAVE)***

1. Enter the following in the **Action / Reason** fields: *Leave of Absence / Choose a reason*.
2. Click on the **Employment Data** hyperlink at the bottom of the screen.
3. Enter the expected return date in the **Expected Return Date** field.
4. Click on .
5. Remove the date in the **Last Day Worked** field.
6. Click on .

To extend a leave with the same reason:

1. Click on the Employment Data hyperlink.
2. Enter the new expected return date in the **Expected Return Date** field.
3. Click on .
4. Remove the date in the **Last Day Worked** field (if populated).
5. Click on .

To change the reason for the next segment of the leave:


1. Insert another row as described above.
2. Enter the effective date in the **Effective Date** field.
3. Enter the following in the **Action / Reason** fields: *Data Change / Status Change (DTA / STC)*.
4. Click on the Employment Data hyperlink.
5. Enter the expected return date in the **Expected Return Date** field.
6. Click on .
7. Remove the date in the **Last Day Worked** field (if populated).
8. Click on .

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

**Note:** Leave of Absence (unpaid) is valid in the **Action / Reason** field only if the employee status is *Active*, *On Paid Leave*, on *Work Break*, or *Suspension*.

---


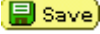
When the employee returns from leave:

1. Insert a row as described above.
2. Enter the effective date in the **Effective Date** field.
3. Enter the following in the **Action / Reason** fields: *RFL*.
4. Click on the [Employment Data](#) hyperlink.
5. Remove the expected return date in the **Expected Return Date** field on the **Employment Dates** page.
6. Verify that the **Last Date Worked** field is blank.
7. Click on .
8. Verify that the employee status is *Active*.
9. Investigate for job data changes due upon Return from Leave (i.e. service adjustment, step increase, contract increase, etc.)

## **ACTION 2: PAID LEAVE OF ABSENCE**

20. Enter the following in the **Action / Reason** fields: *Paid Leave of Absence* (ADM, DEV, or MIL)
21. Click on the [Employment Data](#) hyperlink.
22. Enter the expected return date in the **Expected Return Date** field on the **Employment Dates** page.
23. Click on .
24. Remove the date in the **Last Day Worked** field.
25. Click on .

To change the action to a leave of absence (unpaid) and extend the leave:

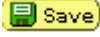
1. Insert another row as described previously.
2. Enter the effective date in the **Effective Date** field.
3. Enter the following in the **Action / Reason** fields: *Leave of Absence*
4. Click on the [Employment Data](#) hyperlink.
5. Enter the expected return date in the **Expected Return Date** field.
6. Click on .
7. Remove the date in the **Last Day Worked** field (if populated).
8. Click on .

To extend the leave for another reason:

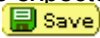
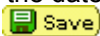
1. Insert another row as described previously.
2. Enter the effective date in the **Effective Date** field.
3. Enter the following in the **Action / Reason** fields: *Data Change*.
4. Click on the [Employment Data](#) hyperlink.
5. Enter the new expected return date in the **Expected Return Date** field on the **Employment Dates** page.

6. Click on .
7. Remove the date in the **Last Day Worked** field (if populated).
8. Click on .



When the employee Returns from Leave:

1. Insert a row as described previously.
2. Enter the effective date in the **Effective Date** field.
3. Enter the following in the **Action / Reason** fields: *Return from Leave / RFL*.
4. Click on the Employment Data hyperlink.
5. Remove the expected return date in the **Expected Return Date** field.
6. Verify that the **Last Date Worked** field is blank.
7. Click on .
8. Verify that the employee status is *Active*.
9. Investigate for job data changes due upon Return from Leave (i.e. service adjustment, step increase, contract increase, etc.)

### ***ACTION 3: FMLA INTERMITTENT LEAVE***


1. Enter the following in the **Action / Reason** fields: *Leave of Absence / FML*
2. Click on the Employment Data hyperlink.
3. Enter the expected return date in the **Expected Return Date** field.
4. Click on .
5. Remove the date in the **Last Day Worked** field (if populated).
6. Click on .

When the employee Returns from FMLA Intermittent Leave:

1. Insert a row as described above.
2. Enter the effective date in the **Effective Date** field.
3. Enter the following in the **Action / Reason** fields: *Data Change / RFL*.
4. Click on .
5. Click on the Employment Data hyperlink.
6. Remove the expected return date in the **Expected Return Date** field.
7. Click on .
8. Verify the employee status is *Active*.

#### ***ACTION 4: RETURN FROM LEAVE***

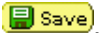
When the employee returns from leave:

1. Insert a row as described above.
2. Enter the effective date in the **Effective Date** field.
3. Enter the following in the **Action / Reason** fields: *Return from Leave / RFL*.
4. Click on the Employment Data hyperlink.
5. Click on the **Employment Dates** page.
6. Remove the expected return date in the **Expected Return Date** field.
7. Verify that the **Last Date Worked** field is blank.
8. Click on .
9. Verify that the employee status is *Active*.
10. Investigate for job data changes due upon *Return from Leave* (i.e. service adjustment, step increase, contract increase, etc.)

#### ***ACTION 5: TEMPORARY ASSIGNMENTS***

1. Enter the following in the **Action / Reason** fields: *Temporary Assignment / TAS*
2. Click on .

Return the employee from temporary assignment by inserting a row.

1. Enter the effective date in the **Effective Date** field.
2. Enter the following in the **Action / Reason** fields: *Data Change / RTA*.
3. Click on .
4. Click on **>Use>** in the navigational breadcrumb as depicted by the arrow below.
5. Click on the General Comments hyperlink.
6. Enter a new row if necessary and enter the following comments:
  - Enter the appropriate name in the **Comments By** field.
  - Enter the appropriate date in the **Comment Date** field.
  - The comments in the **Comment** text field should include the temporary assignment pay, employee classification, start date, and expected end date for the temporary assignment.

### ***ACTION 6: PROMOTION / DEMOTION***

1. Insert new effective dated row.

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**Note:** In addition to the assumptions stated earlier, this scenario assumes that all Position information for the position that the employee is promoted / demoted into has been verified / setup through Position Management. See the Managing Positions section of this manual for more information.


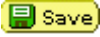
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2. Verify that the **Job Indicator** field displays *Primary Job*.
3. Enter the following in the **Action / Reason** fields: *Promotion / <choose a reason>* for promotions and *Demotion / <choose a reason>* for demotions.



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**Note:** The remaining steps are similar to the original hiring process as described in the Hiring portion of the manual.

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4. Enter the position number in the **Position Number** field.
5. Verify that the following fields default to the correct information: **Position Entry Date, Department Entry Date, Company, Department, and Location**.
6. Click on the **Job Information** tab.
7. Verify that the following fields default the correct information: **Job Code** (and associated title), **Regular / Temporary, Full / Part** (full or part-time position), and **FLSA Status** (found by clicking on  **USA**).
8. Click on the **Payroll** tab.
9. Enter the appropriate pay group in the **Pay Group** field.
10. Click on the **Salary Plan** tab.
11. Verify that the following fields default the correct information: **Salary Plan and Grade**.
12. Click on the **Compensation** tab.
13. Enter the rate code in the **Rate Code** field and the compensation rate in the **Comp Rate** field.
14. Click on the Benefits Program Participation hyperlink.
15. Verify or enter the following: benefit program effective date in **Effective Date** field and benefit program in the **Benefit Program** field.
16. Click on .

***ACTION 7: HIRE TEMPORARY AS A FULL TIME EMPLOYEE (NO BREAK IN SERVICE)***


1. Enter the following in the **Action / Reason** fields: *Data Change*  
Choose a reason.
2. Enter the position number in the **Position Number** field.
3. Verify that the following fields default the correct information:  
**Position Entry Date, Department Entry Date, Company, Department, and Location.**
4. Click on the **Job Information** tab.
5. Verify that the following fields default the correct information: **Job Code** (and associated title), **Regular / Temporary, Full / Part** (full or part-time position), and **FLSA Status** (found by clicking on  **USA** ).
6. Click on the **Payroll** tab.
7. Enter the appropriate pay group in the **Pay Group** field.
8. Click on the **Salary Plan** tab.
9. Verify that the following fields default the correct information: **Salary Plan and Grade.**
10. Enter step information in the **Step** field if applicable.
11. Click on the **Compensation** tab.
12. Enter the rate code in the **Rate Code** field and the compensation rate in the **Comp Rate** field.
13. Click on the Employment Data hyperlink.
14. Click on the **Employment Dates** tab.
15. Enter / verify **Company Seniority Date** and **Service Date.**
16. Enter probation / provisional date (if applicable) in the **Probation Date** field.
17. Verify or enter the following: benefit program effective date in **Effective Date** field and benefit program in the **Benefit Program** field.
18. Click on .

### ***ACTION 8: TRANSFERS***


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**Note:** This scenario assumes that you have already updated the position and have **not** chosen to Update Incumbents.



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1. Enter the following in the **Action / Reason** fields: *Transfer / <choose a reason>*.
2. Enter the new position number in the **Position Number** field.
3. Click on the **Job Information** tab.
4. Click on the **Payroll** tab.
5. Enter the appropriate information in the **Pay Group** field and verify the **Holiday Schedule** is correct.
6. Click on the **Salary Plan** tab.
7. Enter step information in the **Step** field as appropriate.
8. Click on the [Employment Data](#) hyperlink.
9. Click on the **Employment Dates** tab.
10. Enter probationary / provisional dates in the **Probation Date** field if applicable.
11. Click on  to complete the transfer process.

### ***ACTION 9: RETIREMENT / TERMINATION***

1. Insert new effective dated row.
2. Enter the following in the **Action / Reason** fields: *Retirement (or Termination) / <choose a reason>*
3. Click on the [Employment Data](#) hyperlink.
4. Click on the **Employment Dates** tab.
5. Remove the date in the **Last Day Worked** field.
6. Click on .
7. Verify that the employee status is *Retired / Terminated*.

### ***ACTION 10: REHIRE***

1. Insert new effective dated row.
2. Enter the following in the **Action / Reason** fields: *Rehire / Rehire*
3. Enter the position number in the **Position Number** field.
4. Verify that the following fields defaulted the correct information:  
**Position Entry Date, Department Entry Date, Company, Department, and Location.**
5. Click on the **Job Information** tab.
6. Verify that the following fields default the correct information: **Job Code** (and associated title), **Regular / Temporary, Full / Part** (full or part-time position), and **FLSA Status** (found by clicking on  **USA** ).
7. Click on the **Payroll** tab.
8. Enter the appropriate pay group in the **Pay Group** field.
9. Click on the **Salary Plan** tab.
10. Verify that the following fields default the correct information: **Salary Plan** and **Grade**.
11. Enter the step information as appropriate (currently n/a).
12. Click on the **Compensation** tab.
13. Enter the rate code in the **Rate Code** field and the compensation rate in the **Comp Rate** field.
14. Click on the Employment Data hyperlink.
15. Click on the **Employment Dates** tab.
16. Enter (as appropriate) the probationary / provisional date in the **Probation Date** field.
17. Enter or verify **Company Seniority Date** and **Service Date** based on the type of rehire (reinstatement or reemployment).
18. Verify or enter the following: benefit program effective date in **Effective Date** field and benefit program in the **Benefit Program** field.
19. Click on .

## VIEWING SUMMARY INFORMATION

### OVERVIEW

At times, you will want to take a quick look at information summarizing the history of an employee with your organization. PeopleSoft Human Resources features a variety of pages that summarize employee data you have entered in other pages throughout the system.

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**Note:** All of the PeopleSoft pages that are accessed in this section of the training manual are display only pages. No data can be entered or modified.

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### OBJECTIVES

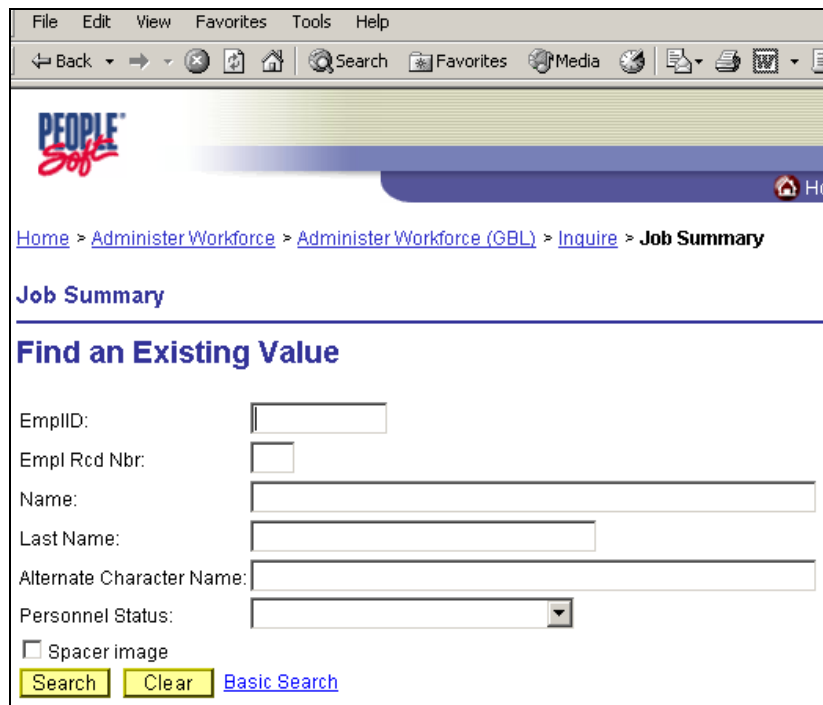
At the completion of this section, you will be able to:

1. View employee job and compensation history.
2. Locate employees by Social Security Number.

## JOB SUMMARY

Use the Job Summary page to obtain an overview of an employee's job history with your organization. You will see all the administrative actions implemented for this employee. Such actions might include pay rate changes, disciplinary actions, leaves of absence, promotions, or transfers. In essence, the information in this page is a summary of any changes entered in the Job Data pages.

Click on **Home > Administer Workforce > Administer Workforce (GBL) > Inquire > Job Summary** navigation path and the following page will appear.



File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Media Print

PEOPLE Soft

Home > Administer Workforce > Administer Workforce (GBL) > Inquire > Job Summary

**Job Summary**

**Find an Existing Value**

EmpID:

Empl Rcd Nbr:

Name:

Last Name:

Alternate Character Name:

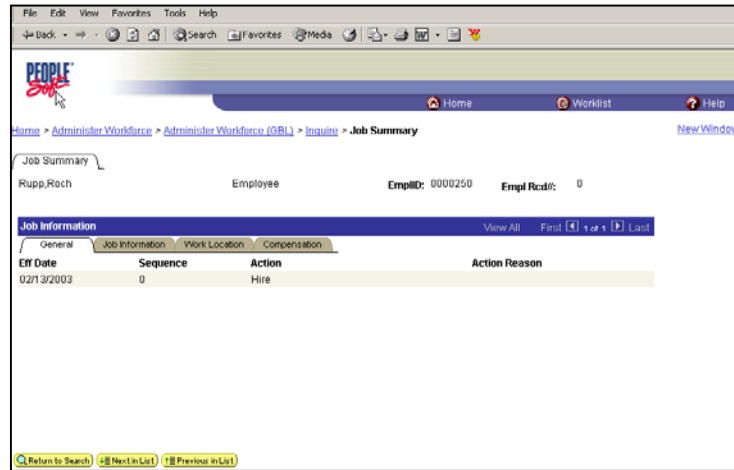
Personnel Status:

☐ Spacer image

[Basic Search](#)

Enter the **Employee ID** or **LastName** in the search criteria box.  
Click on the  button.

The **Job Summary** page will appear.



There are four different pages within Job Summary. They are the **General**, **Job Information**, **Work Location**, and **Compensation** pages.

The following fields are displayed on the **General** page.

**Effective Date** – Indicates when the action took effect.

**Sequence** – Tracks actions that occur in the same day.

**Action** – Describes what action took place.

**Action Reason** – Provides rationale for the action.

Click on the **Job Information** tab to display the following page.

The screenshot shows a web browser window with the PEOPLE Soft application. The breadcrumb trail is: Home > Administer Workforce > Administer Workforce (GBL) > Inquire > Job Summary. The page title is 'Job Summary'. Below the title, the employee name 'Rupp, Roch' is listed as an 'Employee' with 'EmplID: 0000250' and 'Empl Rcd#: 0'. The 'Job Information' tab is selected, showing a table with one record.

Em Date	Sequence	Jobcode	Empl Type	Empl Status	Full/Part Time	Reg/Temp	Standard Hours	Work Period
02/13/2003	0	Appt-NC	Salaried	Active	Full-Time	Regular	40.00	Weekly

The following fields are displayed on the **Job Information** page:

**Effective Date** – Indicates when the action took effect.

**Sequence** – Tracks actions that occur in the same day.

**Jobcode** – Describes the job the employee held after each personnel action.

**Empl Type** – Describes whether the employee was hourly, salary, etc. after each personnel action.

**Empl Status** – Indicates whether the employee was *Active* or *Retired* after each personnel action.

**Full / Part Time** – Indicates whether the employee was a *Full* or *Part Time* employee after each personnel action.

**Regular / Temporary** - Indicates whether the employee was a *Regular* or *Temporary* employee after each personnel action.

**Standard Hours** – Indicates the standard number of hours per week the employee worked after each personnel action.

**Work Period** – Identifies the time period for the Standard Hours after each personnel action.

Click on the **Work Location** tab to display the following page.

Home > Administer Workforce > Administer Workforce (GRL) > Inquire > Job Summary

Job Summary

Rupp, Roch Employee EmplID: 0000250 Empl Rcd#: 0

Job Information View All First 1 of 1 Last

Eff Date	Sequence	Position	Company	DeptID	Sal Plan	Grade	Pay Group	Frequency
02/13/2003	0	Deputy	ND	NDGF	CLSD		PG1	Monthly

The following fields are displayed on the **Work Location** page:

**Effective Date** – Same as previous page.

**Sequence** – Same as previous page.

**Position** – Identifies the Position the employee held after each personnel action.

**Company** - Identifies the organization the employee belonged to after each personnel action was taken. This will display *ND* for State of North Dakota active employees.

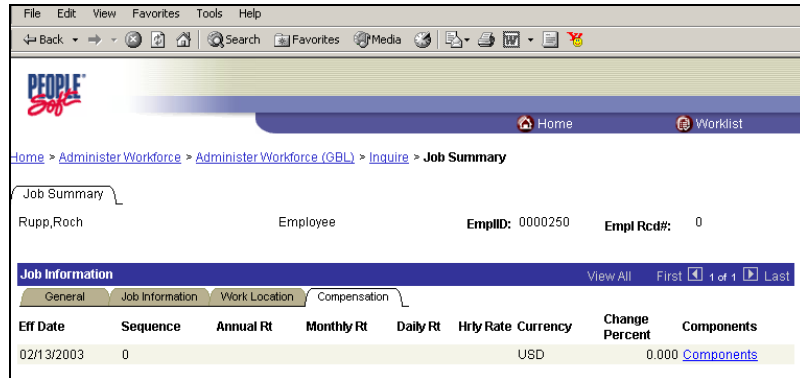
**DeptID** - Identifies the department the employee belonged to after each personnel action was taken.

**Sal Plan** and **Grade** – Indicates the salary plan and salary grade the employee was in after each personnel action was taken.

**Pay Group** – Identifies the pay group the employee belonged to after each personnel action was taken.

**Frequency** – Indicates the pay frequency (e.g. Biweekly) for the employee after each personnel action.

Click on the **Compensation** tab to display the following page.



File Edit View Favorites Tools Help

Back Forward Stop Search Favorites Media Print

PEOPLE Soft

Home Worklist

Home > Administer Workforce > Administer Workforce (GBL) > Inquire > Job Summary

Job Summary

Rupp, Roch Employee EmplID: 0000250 Empl Rcd#: 0

Job Information View All First 1 of 1 Last

General Job Information Work Location Compensation

Eff Date	Sequence	Annual Rt	Monthly Rt	Daily Rt	Hrly Rate	Currency	Change Percent	Components
02/13/2003	0					USD	0.000	<a href="#">Components</a>

The following fields are displayed on the **Compensation** page.

**Effective Date** – Same as previous page.

**Sequence** – Same as previous page.

**Annual Rt, Monthly Rt, Daily Rt, & Hrly Rt** – Indicates the compensation rates for the employee after each personnel action.

**Currency** – This will always be US dollars (*USD*).

**Change Percent** – The percent change in compensation after each personnel action.

**Components** – Each personnel action has a hyperlink to a compensation components page. The compensation page shows the detail pay components such as rate code (e.g. *NAANNL*, *NAHRLY*, or *MTHLY*), compensation rate, and change amounts. Examples of components pages are listed below.

### EXAMPLE COMPONENTS PAGE – AMOUNTS TAB

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Media Print W

PEOPLE  
Soft

Home Work

Home > Administer Workforce > Administer Workforce (GBL) > Inquire > Job Summary

**Salary Components**

Rupp,Roch ID: 0000250 Empl Rcd#: 0

Compensation Rate: USD

Compensation Frequency: M Monthly

**Pay Components**

Amounts Changes Conversion

Rate Code	Seq	Details	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group
1	0	<a href="#">Details</a>						

OK Cancel

### EXAMPLE COMPONENTS PAGE – CHANGES TAB

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Home Work

Home > Administer Workforce > Administer Workforce (GBL) > Inquire > Job Summary

**Salary Components**

Rupp,Roch ID: 0000250 Empl Rcd#: 0

Compensation Rate: USD

Compensation Frequency: M Monthly

**Pay Components**

Amounts Changes Conversion

Rate Code	Seq	Manually Updated	Change Amount	Change Points	Change Percent
1	0	<input type="checkbox"/>			

OK Cancel

**EXAMPLE COMPONENTS PAGE – CONVERSION TAB**

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**PEOPLE**  
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Home Wor

Home > Administer Workforce > Administer Workforce (GBL) > Inquire > Job Summary

**Salary Components**

Rupp,Roch ID: 0000250 Empl Rcd#: 0

Compensation Rate: USD

Compensation Frequency: M Monthly

**Pay Components**

Amounts Changes Conversion

Rate Code	Seq	Source	Default Without Override	Apply FTE	Converted Comp Rate
1	0	None	<input type="checkbox"/>	<input type="checkbox"/>	

OK Cancel

## MULTIPLE JOBS

A Multiple Job employee is an employee who is employed by more than one state agency or employed by both the State of North Dakota and the ND State Universities. Before saving a new employee's hire record, it will be necessary to verify whether the employee already is employed by the State of North Dakota or by the State Universities. This can be done by validating whether the employee's social security number already exists in the system. Follow this procedure:

- Assume the employee is not already in the system. Begin the Hire process.
- When you get to the Identity/Diversity page, enter the employee social security number in the National ID section of the page.
- Tab out of that field and move on to the next section of the page, where the USA flag is displayed (this is the Ethnic Group data). If the employee already exists in the system, you will get the following warning message: "WARNING! National ID XXX-XX-XXXX is already in use for EMPLID XXXXXXXX. A National ID cannot be used in the same county for two different Employees". Do not continue the hire process at this point. You need to verify whether the social security number really does already exist.
- Contact the OMB office. Advise them you are attempting to hire a new employee, and tell them the warning message you have received. With their security access, they can validate whether the social security number you are attempting to enter already exists.
- If they tell you the SSN does not exist, refer back to your documentation to validate the social security number, and make appropriate changes.
- If OMB tells you that the SSN already exists, then you have a situation where multiple jobs are involved. Request the EMPLID of the employee from OMB. Cancel out of the New Hire process immediately. **DO NOT ATTEMPT TO SAVE THE RECORD.** The message you previously received is **ONLY** a warning. If you continue with the hire process, the system will allow it, and you'll end up with duplicate employee records in the system.
- Go directly to Add Concurrent Job (Administer Workforce>Administer Workforce GBL>Use>Add Concurrent Job). Input the EMPLID you were given by OMB. Note the number in the Empl Rcd Nbr field. This field will be

incremented by one when you tab out of EMPLID field. Click on the ADD button.

- You are now on the Work Location page. Insert a new effective dated row reflecting the date the new job becomes effective. When the original Job Indicator is Primary (carrying the Benefits information so that benefit deductions are taken), then the Job Indicator for this additional job should be set to Secondary.
- Complete the series of chained panels as you would for a new hire.

## SEARCH BY NATIONAL ID

Use the Search by National ID pages to locate a person's employee ID number using their Social Security Number. Once you find the person's employee ID, you can use it when you move to other Search pages.

Click on **Home > Administer Workforce > Administer Workforce (GBL) > Inquire > Search by National ID** navigation path and the following page will appear.

Enter the employee's Social Security Number in the **National ID** field (no punctuation is required) and click **Search...**

PeopleSoft then displays the employee's name, employee ID, Country, and National ID Type (e.g. Social Security Number).

You can now use the employee ID for other Search pages.

# HUMAN RESOURCES REPORTING

## OVERVIEW

This section describes how to run and view Human Resources reports through the process monitor and report manager.

## OBJECTIVES

After completing this section, you will be able to:

1. Run Reports.
2. Review Reports through the Process Monitor.
3. Review Reports through the Report Manager.

## RUNNING STANDARD REPORTS

In this section, the general procedure for running the standard reports that come with your PeopleSoft applications is covered. If you (or someone in your organization) have added custom reports to the system, the procedure should be similar to the one described.

The following sections briefly introduce you to the fundamentals of submitting, monitoring, and viewing reports. The following topics will be covered:

- Requesting Reports in PeopleSoft Applications
- Running Reports using the Process Scheduler
- Checking the Status of a Report
- Viewing Report Results

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**Note:** The procedure described in this chapter applies to most standard reports, but not all of them. Some PeopleSoft applications include reports that you run from outside the system, using PS/nVision or a third-party application. The documentation for your application tells you which application to use.

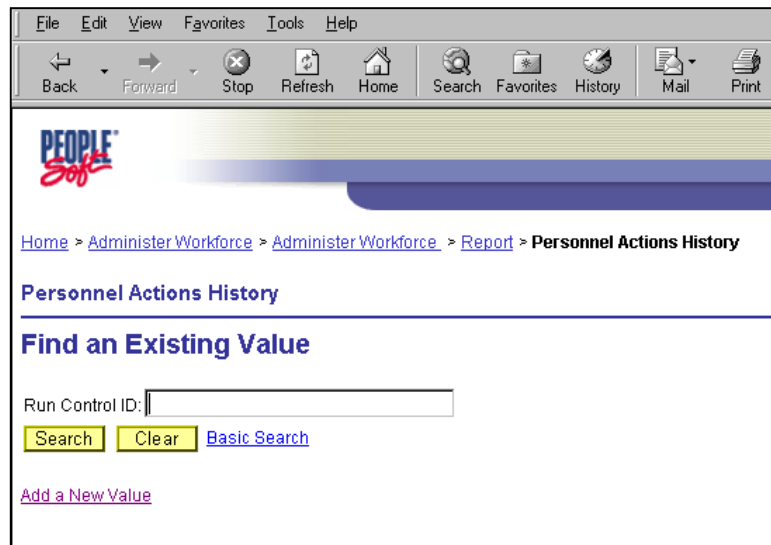
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## REQUESTING REPORTS IN PEOPLESOFT APPLICATIONS

To begin the reporting process, use the following navigational path:  
**Home > Administer Workforce > Administer Workforce GBL > Report > Personnel Actions History.**

The Report Menu List will display several delivered reports that are available through PeopleSoft. For our example we are going to use the Personnel Actions History report.

When you select a report from a menu, you will be prompted for a **Run Control ID**. Each run control you create receives a unique Run Control ID. You may use any value for a Run Control ID. If there is not a predefined Run Control ID, you can create one by clicking on the [Add a New Value](#) hyperlink.



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Home > Administer Workforce > Administer Workforce > Report > Personnel Actions History

**Personnel Actions History**

**Find an Existing Value**

Run Control ID:

Search Clear Basic Search

[Add a New Value](#)

Click on the [Add a New Value](#) hyperlink and enter a value for your **Run Control ID**. This value can be used as often as you like. Click the [Add](#) button.

The screenshot shows a web browser window with a menu bar (File, Edit, View, Favorites, Tools, Help) and a toolbar (Back, Forward, Stop, Refresh, Home, Search, Favorites, History, Mail, Print). The browser displays a web page with the 'PEOPLE Soft' logo at the top. Below the logo is a breadcrumb trail: [Home](#) > [Administer Workforce](#) > [Administer Workforce](#) > [Report](#) > **Personnel Actions History**. The main heading is 'Personnel Actions History'. Below this is a section titled 'Add a New Value'. Inside this section, there is a text input field labeled 'Run Control ID:' containing the text 'JK100'. Below the input field is a yellow 'Add' button. At the bottom of the section is a purple hyperlink labeled 'Find an Existing Value'.

You are now ready to run your report through the Process Scheduler.

## RUNNING REPORTS USING THE PROCESS SCHEDULER

The following page will appear after you have added your Run Control ID.

Follow the directions below to run your report on the process scheduler.

1. Fill in any parameters that are being requested. The ones used for this report are as follows:

**Language** – *English*  
**From Date** – *January 1, 2003*  
**End Date** – *Current Date*  
**Actions** – *Hire*

This will produce a report of all employees hired during the 2003 calendar year.

2. Click on the  button.

The **Process Scheduler Request** page will appear:

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PEOPLE Soft

Home Worklist

Home > Administer Workforce > Administer Workforce (OBL) > Report > Personnel Actions History

**Process Scheduler Request**

User ID: kpurdy Run Control ID: r000

Server Name: Run Date: 02/18/2003

Recurrence: Run Time: 12:28:02PM

Time Zone: Reset to Current Date/Time

**Process List**

Select	Description	Process Name	Process Type	Type	Format
<input checked="" type="checkbox"/>	Personnel Actions History	PER015	SQR Report	Web	PDF

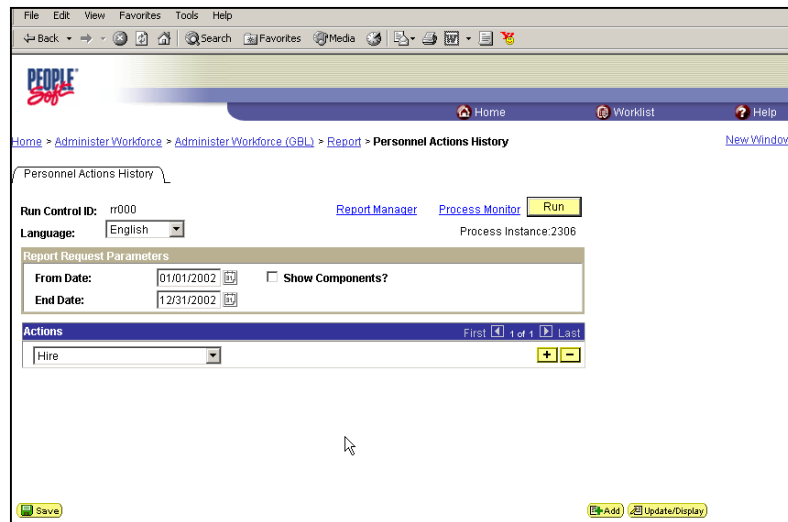
OK Cancel

3. Enter *PSNT* in the **Server Name** field. This is where your process is going to run.
4. The **Type** and **Format** fields will default to the values set for the delivered report. These values can be changed from this page. *Web* and *PDF* are the most commonly used values.
5. Click the **OK** button to continue, or the **Cancel** button to cancel the process.
6. The word *Processing* will appear in the top right-hand corner while processing. The word *Save* will briefly appear when done.

You are now ready to check the status of your report.

## CHECKING THE STATUS OF A REPORT

After you click the **OK** button on the previous page, you will return to the page listed below.



Click on the Process Monitor hyperlink. This will take you to the **Process Request** page. The Process Request page will display the Instance Seq, Process Type, Process Name, User, Run Date/Time, Run Status and Details.

<b>Instance Sequence</b>	The order that your request is being processed.
<b>Process Type</b>	The process type that is being requested. Examples: SQR Report, Crystal, COBOL, Application Engine.
<b>Process Name</b>	The technical name for the report.
<b>User</b>	The User ID running the report.
<b>Run Date/Time</b>	The Date and Time of processed.
<b>Run Status</b>	The status of the report: Queued, Initiated, Processing, Posted, Success.
<b>Details</b>	Link to view run logs and report results.

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PEOPLE Soft

Home Worklist

Home > PeopleTools > Process Monitor > Inquire > Process Requests

Process List Server List

View Process Request For

User: kpurdy Type: Last: 1 Days Refresh

Server: Run Status: Instance: to

☐ View Job Items

View All First 1 of 1 Last

Instance Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Details
2306	SQR Report	PER015	kpurdy	02/18/2003 12:28:02PM PST	Success	<a href="#">Details</a>

<b>Queued</b>	Report is waiting to start processing.
<b>Initiated</b>	Report has begun processing.
<b>Processing</b>	Report is processing.
<b>Posted</b>	Report is posted in the Report Manager.
<b>Success</b>	Report has completed successfully.
<b>Error</b>	Report did not complete successfully.

Depending on how much data you ask the system to retrieve, and depending on the system's current processing load, your report might take only a few moments or considerably longer to run, therefore you may not always see all of the processing stages.

Your user ID appears in the **User** field. You can use the navigation arrows on the screen to scroll through the list. Use the **Server**, **Type**, **Run Status**, **Last**, and **Instance** list boxes to limit the processes that Process Monitor displays.

Click **Refresh** to update this page with the latest system activity. If the **Run Status** column says *Initiated* or *Processing*, the report is still running. When it says *Success*, the system has finished running the report.

After you have received a run status of *Success*, click on the [Details](#) hyperlink and the following page will appear:

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**PEOPLE Soft** Home

Home > PeopleTools > Process Monitor > Inquire > Process Requests

**Process Detail**

**Process**

**Instance:** 2306 **Type:** SQR Report  
**Name:** PER015 **Description:** Personnel Actions History

**Run** **Update Process**

**Run Control ID:** rr000 ☐ Hold Request  
**Location:** Server ☐ Queue Request  
**Server:** PSNT ☐ Cancel Request  
**Recurrence:** ☒ **Delete Request**  
☐ Restart Request

**Date/Time** **Actions**

**Request Created On:** 02/18/2003 12:29:46PM PST [Parameters](#) Transfer  
**Run Anytime After:** 02/18/2003 12:28:02PM PST [Message Log](#)  
**Began Process At:** 02/18/2003 12:29:51PM PST Batch Timings  
**Ended Process At:** 02/18/2003 12:30:05PM PST [View Log/Trace](#)

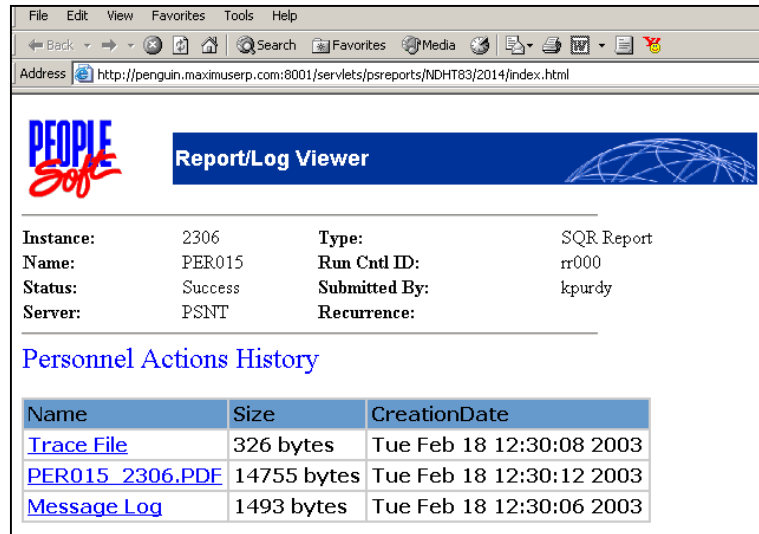
OK Cancel

From this page you can view the Parameters that you requested your process from, any message logs and the actual report results.

## VIEWING REPORT RESULTS

The following instructions will allow you to view the results of your report.

1. Click on the [View Log/Trace](#) hyperlink and the **Report Log Viewer** page will appear.



**Report/Log Viewer**

<b>Instance:</b>	2306	<b>Type:</b>	SQR Report
<b>Name:</b>	PER015	<b>Run Cntl ID:</b>	rr000
<b>Status:</b>	Success	<b>Submitted By:</b>	kpurdy
<b>Server:</b>	PSNT	<b>Recurrence:</b>	

[Personnel Actions History](#)

Name	Size	CreationDate
<a href="#">Trace File</a>	326 bytes	Tue Feb 18 12:30:08 2003
<a href="#">PER015_2306.PDF</a>	14755 bytes	Tue Feb 18 12:30:12 2003
<a href="#">Message Log</a>	1493 bytes	Tue Feb 18 12:30:06 2003

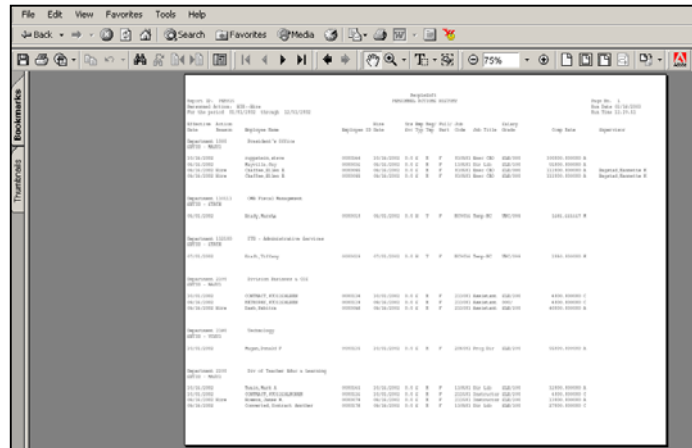
2. Click on the **.PDF** file to view your report. To view file with the .PDF format you must Adobe Acrobat Reader loaded on your system.








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**Note:** The PER015 – is the Process Name that we requested earlier. The 2306 – is the Instance Seq. and '.PDF' is the file format that we requested. The Message Log will display error messages for runs that were not successful. The Trace File is used by technical staff.

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## COMMONLY USED ADOBE BUTTONS



	Save to a file
	Send report to the printer
	Zoom In for larger view
	Zoom out for small view
	Navigate through pages
	Page actual size
	Page fit in window

## VIEWING PREVIOUS REPORTS

To check the status of your report, or view previously ran reports, you can navigation to two different locations:

- ***PeopleTools > Process Monitor > Inquire > Process Request***
- ***PeopleTools > Report Manager > Inquire > Report List***

Report Manager is like your own personal "in box" of reports and processes that you have access to. It provides a secured means to view report content, check the status of a job, and see content detail messages.

Whether you are in the Process Monitor or the Report Manager your User ID will be displayed. Depending on your security settings, you may be able to change the User ID listing. To limit the results listed use one of the drop-down parameters and click the refresh button.

## CANCELING OR HOLDING REPORT REQUESTS

Depending on the status of your report, you can cancel it or put it on hold. If the system is done processing a report, you can delete its information from Process Monitor. Click **Details** to display the options for canceling or holding a request.


## EMAILING THE REPORT

Choose type of *Email* and *HTM* when you are initially running the report.

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**Note:** If you are entering a list of email addresses, make sure to use a ***semicolon*** to separate each address from the others.

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You can add users or roles to the distribution by adding a row and filling in the pertinent information. You can also use this page to add someone who would not normally have the proper Setting Report Distribution. The **Distribution Detail** page allows you to choose the recipients of your process output. To set up distribution for your process output, click on the  icon.

If the process that you are running allows output that can be emailed, you can enter an email subject and message and send the output to a group of email addresses with security to view this output.

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**Note:** You can add users or roles to the distribution by adding a row and filling in the pertinent information. You can also use this page to add someone who would not normally have the proper security to view this output.

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